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ABSTRACT

Proceedings of a 1981 joint conference sponsored by the Southern Association for Institutional Research (SAIR) and the North Carolina Association for Institutional Research are presented. The conference theme was the practice of institutional research. Contents include preconference workshop reports, speeches, abstracts of papers, and reports of SAIR affairs. Documents and authors are as follows: "Nouns, Numbers and Neutrality" (keynote address, Jeffrey Holmes); "Role of National, Regional and State AIR Groups in Enclosing Professional Development" (panel report); "Research in Questions of Equity and Discrimination" (panel report); "Executive Order 11246 and Institutional Research" (William Fendley, Jr.); "Faculty Salary Sex Equity Studies at a Major Research University" (Rodney G. Hurley, Marilyn K. Brown, Frank A. Schmidtlein); "Testing Equity in Salary and Workload at Your Institution" (Gerald W. McLaughlin, James R. Montgomery); "Student Evaluation of Graduate Programs in Selected Southern Universities" (Carol A. Kayla, Virginia Eman Wheeless, Richard D. Howard); "A Markov Chain Application to College Admission Policy" (Robert M. Ussery); "Development of a Planning, Budgeting, and Evaluation Model" (Thomas R. Cochran, Nathaniel L. Felder); "Measurement of Quality in Off-Campus Credit Programs: A Non-Intrusive Approach by a State Agency" (Albert Lynd, Randall R. Powell); "Policy-Impact Analysis: Implications for Institutional Research" (James L. Morrison); and "Modeling with Microcomputers" (R. Gregory Litaker). Additional topics include: planning and management information systems, statewide institutional research, and students/attrition/demographics. (SW)

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A joint conference of the
Southern Association for Institutional Research
and the
North Carolina Association for Institutional Research

The Practice of Institutional Research

Annual Conference Proceedings
October 29-30, 1981
Charlotte, North Carolina

Edited By
Mary P. Martin
E. Michael Staman

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ANNUAL CONFERENCES

Southern Conference on Institutional Research

Atlanta - 1974	Compliance Reporting - Policies and Procedures for Compliance
Atlanta - 1975	Information for Decision Making
Atlanta - 1976	Current Issues and Research Efforts in Institutional Research
Atlanta - 1977	The Institutional Research Interface with Data Suppliers and Data Users

Southern Association for Institutional Research

Nashville - 1978	The Relationship Between Institutional Planning and Institutional Research
Orlando - 1979	The Future of Institutional Research
Louisville - 1980	Problems and Perspectives for Institutional Research in the 1980's

Southern Association for Institutional Research and North Carolina Association for Institutional Research

Charlotte - 1981	The Practice of Institutional Research

Southern Association for Institutional Research

Birmingham - 1982	Resources in Institutional Research

Message from the Conference Chair

It seems to me that the power of volunteerism is particularly well exemplified when one sets out to organize a group to plan and conduct an event such as a combined conference of the Southern Association for Institutional Research and the North Carolina Association for Institutional Research. Peop'e like to volunteer, and they seem to get a great deal of satisfaction from contributing to what is ultimately a team effort directed toward providing a service to some two hundred individuals from a wide geographic area.

My gratitude and appreciation goes to all who helped, with particular kudos to the Planning Committee. Joe Saupe, Mary Martin, and Jeanne Budig reviewed the contributed papers; Denise Strenglein was in charge of Publicity and Finance; Ben Romain was the Local Arrangements Chair; Maryann Steele Ruddock conducted the evaluation; and last, but not least, Don Altieri was the Conference Co-Chairman. One cannot buy effort and dedication that they provided; one cannot fail when the effort is of the quality given in this case.

One particular individual deserves special mention. As those who have attempted it will attest, the tasks of coordinating the submitted papers activities and of editing the Conference Proceedings are particularly arduous and time-consuming ones. Mary Martin, from the University of Missouri Central Administration, performed both those tasks for the 1982 Conference. The abstracts which were distributed at the Conference and these Proceedings are the visible results of her efforts, and the Southern Association for Institutional Research should be proud that it has such an able and capable volunteer.

E. Michael Staman

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A Message From the SAIR President

Larry G. Jones

University of Georgia

Professional meetings, conferences, and forums come and go. Some are well remembered; some are quickly forgotten. Some are eagerly anticipated; some are dreaded. What actually distinguishes one meeting, conference, or forum from another is not always clear. Location, hotel, special events, people, and program are important, but the characteristics of a meeting tend to blur ultimately into one overall impression.

My impression of the 1981 combined annual conferences of the Southern Association for Institutional Research and the North Carolina Association for Institutional Research is very positive. The conference evaluation also reveals a positive feeling on the part of those who attended. Actually, those feelings come as no surprise. SAIR conferences have always been favorably received, and each succeeding conference is expected to be even better than the previous ones. Perhaps the Charlotte conference (they do tend to be designated by location) will be remembered as the first joint meeting with a state AIR association; perhaps it will be remembered for one of the workshops, for one of the papers, for Jeff Holmes's admonition to "keep it short, keep it simple, and keep it neutral," or for friends made and acquaintances renewed. For all those reasons and more, the 1981 conference will be remembered favorably by all who attended.

Notwithstanding the success of the Charlotte conference, the Birmingham conference can be even more successful. Those who attend next year's conference will again find significant opportunities to enrich professional competencies, to develop professional friendships, and to discover why the Southern Association has become a telling force in the international scene of institutional research.

I will remember the 1981 SAIR-NCAIR conference as a great event, and I look forward to the 1982 conference in Birmingham. Your enthusiastic participation will assure the continued success of the Southern Association for Institutional Research.

A Message From the NCAIR President

Timothy R. Sanford
The University of North Carolina at Chapel Hill

Through the North Carolina Association for Institutional Research, the Tar Heel State was pleased and honored to host the first joint conference with the Southern Association for Institutional Research. For that matter, this was the first joint conference involving any state, regional, or national AIR association. While NCAIR is not overly concerned with achieving "firsts", the Association has ventured into new territory on several occasions in its nine year history.

In 1977-78 under the leadership of Don Reichard at UNC-Greensboro, NCAIR was instrumental in coordinating the first statewide follow-up study of graduates of all institutions of postsecondary education in the state. This was a joint undertaking involving the state career planning association, the Department of Community Colleges, the independent college association, and the General Administration of the University of North Carolina system.

Also in 1978 NCAIR had a joint conference on institutional research and student financial aid at the Mid Pines Club in Southern Pines which was co-sponsored by the state student aid administrators association.

In 1981 the Association again made contact with the State Department of Community Colleges and co-sponsored a two day workshop on planning and institutional research in the two-year college. Durham Technical College hosted the program and over fifty persons from across the state participated.

Currently we are planning some type of joint activity with the state adult education association which will look at the adult student, the place of continuing/extension education in the college of the future, and the need for better research in these areas. Also on the planning board is another meeting with the student aid group to discuss the effects which the cuts in federal aid might have on our institutions.

The tendency of NCAIR to go outside of the Association suggests an aspect of institutional research of which we, as practitioners, need to be more aware and which the associations can do more to promote. This aspect, of course, is the necessity for institutional researchers to leave their offices, their print-outs, and their questionnaires to learn as much about their institutions and higher education as possible. Interaction with other offices, faculty members, students, and people outside of the institution can give institutional researchers a perspective on their work which cannot be gained behind the desk or in front of the computer terminal. Just as we learn by meeting with our counterparts across the state, region, or nation at conferences, we can also gain in experience and knowledge by meeting folks whose areas of responsibility do not normally intersect with institutional research. NCAIR believes that encouraging such interaction is an important part of its functions.

The joint SAIR/NCAIR conference was a worthwhile addition to normal NCAIR activities and allowed many NCAIR members to meet with their regional colleagues for the first time. As president, I am delighted to receive the many compliments which came out of the conference, but I must share the accolades with two NCAIR members who contributed to the conference in far greater measure than I did - Don Altieri from Caldwell Community College and Technical Institute who served as Co-Chairman of the conference as NCAIR's President-Elect and Ben Pomain from UNC-Charlotte who served as Local Arrangements Chairman and is a past president of NCAIR.

PRE-CONFERENCE WORKSHOPS

There were four workshops held prior to the conference:

I. Statistical Analysis System (SAS)

Staff: Sandy H. Davis, North Carolina Central University
Linda K. Pratt, North Carolina Central University
Norman P. Uhl, Mount St. Vincent University, Nova Scotia

Description: This workshop illustrated several ways in which an institutional research office on a medium sized campus (approximately 5,000 students) used a particular computer resource, the Statistical Analysis System (SAS). The emphasis was on the application of various software systems to specific problems in institutional research and planning.

II. Conducting a Public Image Study

Staff: Charles H. Bryson, Georgia State University
Margaret M. Sullivan, Georgia State University

Description: This workshop was designed to assist the institutional researcher in the development and use of public opinion surveys. Participants were instructed in the value and construction of survey instruments. A successful case study, first conducted in 1978 and replicated in 1981, was used to demonstrate how a survey could assess an institution's public image while simultaneously informing the public of major institutional characteristics. The development of the case study instruments included various institutional interests such as admissions, recruiting, student aid, athletics, academic programs, development, and library.

The workshop emphasized the methods used for conceptualizing questions, developing survey items, facilitating data gathering, reporting results, and providing information. These important steps, often taken for granted, were discussed as they related to changes needed for future operational success. Formal reporting of research results were contrasted with other forms and styles adapted to specific purposes: internal administration, student newspaper, and participant feedback. Reporting protocol and sensitivity were discussed.

III. How to Spot Patterns of Enrollment Behavior

Staff: Charles D. Salley, Graduate School at Queen's College, North Carolina

Description: This workshop covered the following topics of analysis with an example of applications to a large urban public university: identification of past cyclical and trend variations in enrollment; correlation of cyclical enrollment variation with the business cycle; and use of the information from the former two to develop a simple model to predict short-run variations.

IV. Newcomers Workshop

Staff: John S. Chase, Simon Fraser University, British Columbia
James P. Gunnell, Virginia Union University
James R. Montgomery, Virginia Polytechnic and State University
Donald M. Norris, University of Houston, Texas

Description: This workshop was designed for newcomers, recently involved in the responsibilities of institutional research. The format offered the sharing of expertise developed in the profession and the opportunity to work with colleaques from similar institutions, practitioners in the area of institutional research and planning, or other administrators who must depend on the function of institutional research for information and analytical support to their decision processes. The objective of the workshop was to provide participants with specific strategies, approaches and techniques for dealing with the major problems that confront an institutional research office. This objective was pursued by means of in-basket simulation exercises designed to emphasize both breadth and depth. An enrollment projection exercise explored alternative methodologies for estimating future enrollments. Indepth analyses and analytical techniques were stressed.

Keynote Address

NOUNS, NUMBERS AND NEUTRALITY

By Jeffrey Holmes

I'm somewhat surprised to be here. Until an unfortuante miscalculation a week ago, I had expected to be pitching the seventh game of the World Series (probably in a blinding snowstorm) for a team which did rather better against those dreadful Dodgers than the New York Yankees did.

The reference in your program to my numerous publications should be qualified. Some were of rather restricted circulation, like the monthly series I addressed to the General Officer Commanding, West Africa, in my capacity as Motor Transport Officer of the 3rd Nigeria Regiment, entitled: State of Vehicle Readiness. These reports proved statistically that the battalion was ready to move to meet any invasion from any quarter. I've never quite trusted numbers since.

As a published author, I have always wanted to tour to read from my works in progress. I've never done it but today's address may well be described as a speech in progress--in that I haven't finished writing it. I may have by the time I end it. On the other hand, I may not. This is not simply because of innate laziness but because I suspect that the age of writing has almost reached its end.

I'll explore that threatening thesis during the final three or four hours of today's address but I am alerting you to that element of far-sighted vision which may make this occasion memorable in the annals of institutional research. (And then again it may not.)

The burden, though, of my text today touches more immediate concerns under the heading:

Nouns, Numbers and Neutrality

as they lead to

Veracity, Verbs and Vectors

Not a topic upon which one would instinctively seize for a light after-lunch address but one which (surprisingly in my case) bears some relation to the topic of your conference.

I would like to suggest--in fact I shall suggest--that, in considering the dazzling array of tools and techniques available to an institutional researcher, you are in danger of forgetting those basic tools without which your sophisticated work will fall flat: Nouns, Numbers and Neutrality.

Of course you all use nouns. But institutional researchers tend to be

of the polysyllabic persuasion: The more multivariate the analysis, the more multivowelled the synthesis. Please use short nouns.

Of course you all use numbers. But the more you chi your squares the more you square your results--to a dismaying degeneration of decimals. Please use short numbers. (I hasten to make clear that when I say "you" I am not referring to this audience, none of whom would be guilty of verbal or numeric extremism, even in the defense of liberty. But I hope to reach a national audience with these remarks and you will readily understand that they are addressed to those who live--many through no fault of their own--to the north and west of this region.)

But please remember that the best nouns are the shortest and the best numbers the roundest--give or take a digit. I stress here, though, that this speech reflects my personal views and must in no way be attributed to Statistics Canada. My guidelines are: two syllables and two significant digits.

I hear gasps of horror. But even three digits may lead the lay user to infer a 99% accuracy in the data presented. And you wouldn't want to imply that, would you?

Those who translate your findings into action usually don't give a damn about a decimal. They would sooner you be roughly right than precisely wrong. For most purposes, decision-makers seek cruder measures than you can contemplate with professional pride. They want numbers which, to quote a Jim Montgomery character, are "jest about right". (For those of you who were not at the Orlando SAIR, I'll explain that reference as I am going out the door. When I start telling Montgomery jokes that will be the end.)

The three of you who are still awake will have noted that I use "you" and "they" in talking about the institutional researcher on the one hand and the decision-maker on the other. I make no apology. As institutional researchers you may be (you should be) part of a decision-making team but you are not a decision-maker. Your facts will provide veracity (truth) as a base for the verb (an action) to move along a vector (which, when I was in aircrew training, was a line to follow to reach a desired objective). If you want to be part of the action, then learn the techniques and practices of institutional research for four or five years and change jobs. You will find, I predict, that you have no more freedom of action, whether at the institutional, state or federal level, but that is something you will have to discover for yourself.

So keep it short, keep it simple, and keep it neutral.

That is my only advice to you today. I shall now quote the literature--and myself--to support that executive summary. In this I am following the advice of Joe Saupe in that excellent pamphlet The Functions of Institutional Research, just published by the AIR. On page 9 he reminds us that:

> "The audiences for reports of institutional research are typically administrators who often are served best by a concise report--an executive summary--which emphasizes the results and, perhaps, implications of the project. However, because faculty members are often consumers of institutional research and because administrators have faculty backgrounds and perspectives, it is well to have a complete report in the file for use in answering questions of detail which may be raised".

Saupe is talking about the art of reporting research results. And it is an art. Like any artist, the institutional researcher should not let the reader know just how the work reached its finished state. That great chef who prepared you that fabulous meal at the exclusive restaurant doesn't serve it wrapped in the recipe. And what if Shakespeare Was (as has been brilliantly demonstrated in a well-known work) a Computer Programmer. We don't care. The play's the thing. So don't let the decision-makers do more than peep behind the curtain but--again Saupe's advice--keep your files dry.

Saupe goes on with his very useful and practical advice...and I would say that even if he hadn't paid me. (I should explain that my expenses' arrangement covers my full return costs from Ottawa to the Canadian border plus all the sponsorships I can sell.) He cautions:

> "Certainly the researcher should illuminate the subject of the research to whatever degree the evidence and the researcher's experience and expertise permit. At the same time, the distinction between the roles of the researcher and the decision-maker needs to be maintained."

Decisions! Decisions! you say. What about scholarly research (especially by those who have faculty appointments)? Even here, the need for clear presentation remains. In the year 2081, which research report will be read, the clear and short or the ambiguous and lengthy agglomorate of data?

The basic user of work, however, is the administrator crossing the deserts of data, seeking the oasis with its palms of perspicacity and its wells of wisdom. (I get a bonus for purple prose.) Even those wells are frequently

choked with the sands of superfluity. So give the decision-maker the data in a form she can use. You might even confess that there is only an 80% chance that the data are 90% correct, although I think that honesty can be overdone. Remember, though, at least for your own understanding, Einstein's caution:

> "As far as the laws of mathematics refer to reality, they are not certain; and as far as they are certain, they do not refer to reality."

Remember, too, the immortal response of Montgomery, at 8 a.m., October 29, 1981, when asked 'Who won the game?': "The Dodgers bombed them, 8-2. Or maybe 9-2. One of those numbers." Keep in mind, finally, the dictum of hockey coach Scotty Bowman: "Statistics are for losers." Too many researchers, in fact, use statistics like a drunk uses a lamp standard, for support rather than for illumination.

"Illuminate" is a word which Saupe uses several times in his pamphlet. It means "to throw light upon". Not "to set fire to"--after soaking in the gasoline of your personal views. Not "to throw dark upon", with a prose style of a complexity and dullness to suggest Roman catacombs.

But, you ask, how can you illuminate a complex, technical subject? How steer between the Scylla of passion and the Charybdis of passivity? How write something neutral but not neutered? Well, no one said it would be easy; but it can be done.

How many of you have read Gödel, Escher, Bach? by Douglas Hofstadter? (VERY FEW HANDS RAISED.) That's interesting in itself because the book has a mathematical base, was top of the campus bestseller list for months, and got the best review I can remember in the Chronicle of Higher Education. Well I have read it all--though not at one sitting!--and I don't like technical subjects. Hofstadter, though, tells stories, uses pictures and diagrams, uses numbers, and uses English. (When I say English, you will understand that I am not automatically excluding American.) Large sections of this book are written in simple English, arranged in simple sentences. Now it isn't The Chancellor Manuscript or The Ipcress File; you have to take it slowly. But Hofstadter leads you through the labyrinths of thought process and artificial intelligence without losing you and without talking down to you. As an institutional researcher you are not going to publish 777-page reports (I'm inclined to think, since 7 is a magic number, that he got the publisher to hit that length

deliberately) and you are not dealing usually with abstracts. You're dealing with tangibles such as enrollment and you can produce compelling reports, without intruding your own views.

A year or so ago, two of my colleagues, Mary Sue Devereaux and Edith Rechnitzer, came to me with the draft of a publication called Higher Education, Hired? It was based on a Statistics Canada study of the first two years of employment experience of the 1976 college and university graduates. They proposed to introduce their particular study of the experience of women graduates with an essay which would set the context. (This was a clever move on their part since I had used such a device myself a few months earlier!) It was a good essay on the place of women in the modern working world; unfortunately, every quote was in support of a strong, feminist viewpoint and many of the women quoted were well-known feminists. "This is not an essay," I declaimed, "it's a polemic. It's improper for you to push forward your own views like this, even hiding behind the skirts of other writers; and it won't do you any good because it will raise all the male chauvinist hackles. Why don't you," I advised, "let the data speak for themselves."

They came back with a very simple publication, of some 40 tables, each with a short statement on the facing page. The first page (I'm sorry, I forgot to bring a copy with me to quote) said something like: Women graduates earn less than male graduates. "Ah," I said, "but you have to look at that in regard to chosen occupation." I turned to the next page: "This is true whatever the chosen occupation." "Ah," I said, "but you have to take into account the degree course." I turned to the next page: "Or the degree or diploma course followed." By page 9 I had run out of variables and with each page the indictment grew clearer. The publication spelt DISCRIMINATION in large letters and it did so without the authors expressing a single personal opinion. Nor have we had a single attack on the data since it was published.

So, don't be afraid to let the numbers speak for themselves. They can be as dramatic as a piece of theatre if they are presented well. And for your analysis, try using words which don't end in "ation". The dictionary is a good source (Oxford if you can, Webster if you must). Try sitting it in your bathroom.

There is one small problem if you produce simple, clear reports: you may be understood. This is fine when the news is good but....The Bible, a very good guide to simple prose which used to be popular reading, has a good illustration of this problem in the Second Book of Samuel, Chapter 18, where King David is waiting the results of the battle with his revolting son Absalom. Two

runners are seen approaching:

> 27 And the watchman said, Me thinketh the running of the foremost is like the running of Ahimaaz the son of Zadok. And the king said, He is a good man and cometh with good tidings.

The running of institutional researchers during the eighties, alas, is more likely to be like the running of the second messenger, Cushi.

Still it has never been easy for institutional researchers. You will remember St. Bubonus, clearly the patron saint of institutional researchers, although he would not have understood the term and would not have realised that IR was what he was doing. 'Bad-news Bubonus', as they called him in the legion, was martyred in 339 AD, you may recall, by being buried alive in the Imperial archives, for having used three years supply of the legion's papyrus in three months. IR was not easy in those days, given those awful Roman numerals, but he was unwisely prolific. 'Bubonus DC', one of his other nicknames, referred of course, to the 600 (DC) papyritic pages of his study of dropout rates of Roman legionnaires on a forced march from Tyre to Sidon. As a researcher he showed great promise and his unfinished work on the potential of the elephant as a data storage device was far ahead of its time. A great man, St. Bubonus, and I think it unfortunate that they named a plague after him.

I hope I am far ahead of my time in predicting the end of the writing era but the portents are there. In that superb 16 mm. short film Why Man Creates there is a scene where a woman seated at a table asks a man a question, but as a number. He answers with a number. She asks a longer number; he numbers back... until they vanish beneath the sea of numbers. A friend tells me that conversation on the police radio in Ottawa is sometimes a string of numbers. Added to this increasing use of numbers we have the pressure of radio and television on the language...a pressure which threatens to burst the formal structure. And the demands of the talking computer are now emerging.

In this state of linguistic flux, we may be ready for the birth of a new language, combining the needs for numeracy and literacy: some lingua franca which would allow mathematicians and humanists to talk to each other, would allow the computer programmers and decision-makers to understand each other.

Perhaps, though, the new language might involve neither tongue nor words. If a picture is worth a thousand words, it might be worth 10,000 numbers. A computer-drawn colored map of Quebec showing the results of the 1980 referendum told its crystal-clear story without a single number or word. Maybe the next time you invite me to speak, I shall simply flash colored pictures at you.

Whatever the form of future communication, I insist that decision-makers will need data and analysis which is not too sophisticated. Something just about right....

A mountain man, somewhere north of Charlotte, gave his friend a jug of homemade brew as a present. When he saw him a few weeks later he asked:

"Herb, how was that jug I gave you fer Christmas?" "Well, hit was jest about right. If hit had been any worse, I couldn't have drunk it. If hit had been any better, you'd ha' kep" it yerself." (1)

Ladies and Gentlemen, I am going to be bold enough to suggest that this keynote speech was just about right: If hit had been any worse, you couldn't have listened to it. If hit had been any better, you'd ha' given it yerself.

(1) Quoted by permission of James Montgomery, Blacksburg, VA.
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PANEL

ROLE OF NATIONAL, REGIONAL, AND STATE AIR GROUPS IN ENHANCING PROFESSIONAL DEVELOPMENT

Don Reichard, Chair, AIR Professional Development Services Board, University of North Carolina at Greensboro

Tim Sanford, President, NCAIR, University of North Carolina at Chapel Hill
William Jackameit, President, VAIR, James Madison University
Larry Jones, President, SAIR, University of Georgia

The primary question addressed by this panel was "What should, or can groups like SAIR, NCAIR, VAIR, and AIR be doing to enhance the professional development of their members?" After indicating patterns of overlap in state, regional and national institutional research association memberships, panelists described what their associations were doing and speculated as to what their organizations might do to better serve their members. Presentations by panelists served to facilitate a period of open discussion with the audience.

PANEL

RESEARCH IN QUESTIONS OF EQUITY AND DISCRIMINATION

Gerald W. McLaughlin
Virginia Polytechnic Institute and State University
Blacksburg, Virginia

David Morgan
Governor's Committee on Postsecondary Education
Atlanta, Georgia

This panel focused on the role that institutional research may need to play in questions of equity and discrimination. The panel members discussed current types of discrimination, cases which have occurred recently, and addressed the questions of equity in a legal and ethical framework. The discussion also included the kinds of data and analyses which are useful and suggested methods for presenting the results. Particular attention was given to issues which involved legal proceedings.

Members of the panel were joined by individuals of the audience in discussing actual experiences in legal actions involving complaints of discrimination and in projects designed to minimize the vulnerability of an institution to charges of bias.

PANEL

SHOULD INSTITUTIONAL RESEARCH AND PLANNING OFFICERS BE POLICY ADVOCATES?

Sandra J. Storrar
Georgia State University

Donald M. Norris
University of Houston, Texas

Harold P. Tuttle
Winthrop College, South Carolina

This panel discussed the different political interaction styles of institutional research and planning officers in the institutional setting. The panel used the results of a national survey of institutional research and planning officers at large public universities. By applying concepts from the field of public administration, this research detected a strong indication of role conflict in institutional research and planning officers of large public universities. Generally, this group perceived their actual role as being both high on political responsiveness and policy advocacy; they preferred a role directly opposite - of policy advocacy with low political responsiveness.

SAIR/NCAIR ABSTRACTS

October 29 and 30, 1981

Charlotte, North Carolina

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EQUITY RESEARCH

Chair: Robert I. Lewis, II. University of Arkansas-Little Rock

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	Rodney G. Hurley, Marilyn K. Brown, Frank A. Schmidtlein, U. of Maryland, "Faculty Salary Sex Equity Studies at a Major Research University: Comparison of 1979 and 1980 Results."	18
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	Gerald W. McLaughlin, James R. Montgomery, Virginia Polytechnic Institute, "Testing Equity in Salary and Workload."	20

This session will address the equity issues of faculty salaries in relation to such factors as sex and workload. It will also discuss the position and lack of progress of women administrators in academia. Affirmative action obligations of institutions of higher education will be presented in the context of the role of institutional research. Personal and institutional experiences on equity research will be shared.

EXECUTIVE ORDER 11246 AND INSTITUTIONAL RESEARCH

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During the last several years, offices of institutional research have become increasingly involved in the federal procedures required of institutions of higher education as they comply with the regulations of Executive Order 11246, which imposes affirmative action obligations on federal contractors. The role of institutional research has been to provide statistical data to support the affirmative action plan of the institution. Developing and generating data for analyses such as the workforce analysis, availability and utilization analyses, and goals and timetables initially placed additional burdens on institutional research's time and resources. However, having coped with the additional responsibilities and having proceeded to generate rather routine annual reports, institutional research now faces more tasks in the recently imposed "eight-factor analysis," which presumably helps the contractor to determine the availability of minority group members and women for jobs. For institutions who have already developed or begun to develop this analysis, difficulties in the development, increases in workload, and questions of its relevancy have arisen.

Relatedly, among the issues being studied by Senator Orrin G. Hatch of Utah in his recently initiated hearings on the constitutionality of affirmative action is the eight-factor analysis. Simultaneously, OFCCP is in the process of proposing revisions in the regulations governing affirmative action requirements. Although proposals have not been published, questions were posed in the July 14 Federal Register to determine the public's attitudes towards revisions. Concurrently, the Equal Employment Opportunity Commission agrees with the agency's decision to approach the public for answers to the questions. Several of the questions concern the eight-factor analysis and the general approach to developing goals and timetables. These developments, as well as the recent draft Executive Order recommending the use of a five percent standard of statistical significance for determining whether contractors are using minority group members and women in proportion to their presence in the workforce, behoove institutional researchers to become knowledgeable of the recent developments and future federal legislation in order to be better prepared for future dealings with the Department of Labor and their area Office of Federal Contract Compliance Programs. Further, institutional researchers should develop a dialogue among colleagues concerning affirmative action/EEO issues and be prepared to influence public policy as a group.

At the recent national AIR Forum in Minneapolis, interest in areas of AA/EEO was shown by a well-attended impromptu session. At the session the attendees indicated the desire to have similar sessions at future AIR forums. This indicates the level of involvement institution researchers are beginning to experience in these areas.

FACULTY SALARY SEX EQUITY STUDIES AT A MAJOR RESEARCH UNIVERSITY

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The Vice Chancellor for Academic Affairs at the University of Maryland, College Park has monitored the relationship between male and female faculty salaries for several years to ensure University policies in this area are reflected in individual salary actions. As part of this regular monitoring, the Vice Chancellor in December, 1979 asked the Office of Institutional Studies to cooperate in a study of male and female faculty salaries, based on Fall 1979 salary data. Accordingly, the purpose of the study was to provide data and analyses to the Chancellor, Vice Chancellor for Academic Affairs, and other campus officials which would enable them to make informed judgments on the equity of salaries paid male and female faculty. This study examined differences between full-time male and female faculty members who hold the doctorate degree. It focused on any differences which may be attributable to the annual salary review process.

The study employed a curvilinear multiple regression analysis model for predicting male salaries by years-since-doctoral degree, rank and academic unit groups. Comparable women were projected through the corresponding male equations and female salary surpluses and/or deficits were accumulated by academic unit grouping.

For UMCP in total, the study contains a conclusion that the accumulated salaries paid female faculty members holding the doctoral degree are $105,554 less than the corresponding male salary levels; when controlling for rank and years-since-doctoral degree. For the 189 women this amounted to an average salary deficit of $558. The salary differences were not evenly distributed among the divisions.

The disparity between male and female salaries was greatest at the professor rank. The average salary deficit per female at this rank was $1,071.50, over twice the average amount at the associate and assistant ranks. Only 13.8 percent of the total female faculty were at this rank but they accounted for 26.4 percent of the total salary deficit.

Based on the findings of this study the Chancellor directed the Academic Division Provosts to create select committees for the purpose of reviewing all female faculty salaries in their respective departments, colleges and schools. This process resulted in decisions by the Chancellor to increase the salaries of 68 women, by a total of $70,612, or an average of $1,038.41 per affected female, for the fiscal year beginning July 1, 1981.

Further studies are planned of differences attributable to salary levels established at initial appointment and of salary differences attributable to promotion and tenure actions. An additional study also is planned to examine salary differences between male and female faculty who do not possess the doctoral degrees.

UNCOMMON WOMEN/COMMON THEMES
Career Paths of Upper-Level Women Administrators in Higher Education Institutions

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Despite equal opportunity legislation, affirmative action, and a social climate more supportive of women's professional aspirations, the position of women in academe appears to have changed very little over the past several decades. In particular, women's progress into the upper levels of higher education administration has been especially slow. It has been noted that about ninety-five percent of today's college students attend institutions where all three of the top administrative positions--president, chief academic officer, and dean--are held by men.

Some of this may seem to be explained in terms of credentials and experience. Because women earn only one quarter of the doctorates awarded, and continue to cluster in the lower faculty ranks, the pool of those eligible for management posts is very small. Yet these facts do not address the more fundamental issues of differential socialization, occupational stereotyping, and the traditions and values of higher education that tend to work to the disadvantage of females. In addition, so few women "at the top" perpetuates the problem by setting subtle limitations on other's perceptions of what is possible and thus, worth striving for.

This cycle has suggested an investigation that focuses on achievement rather than the lack of it. Although their numbers are small, clearly some women have overcome whatever barriers exist and now hold positions of high responsibility in academic administration. The perspective of the study is that their career paths can be instructive about the nature of their success--the balance of choice and chance and the behaviors and strategies that have been utilized to enhance the possibilities.

The source of data is a sample of 30 women who are currently upper-level administrators in 25 different North Carolina four-year colleges and universities. A variety of positions is represented with half of the group employed by private colleges and half by institutions of The University of North Carolina system. The investigator personally conducted a two-hour structured interview with each subject covering background and education; the influence of family, friends, and mentors; and work history. Participants were also asked for their perceptions of the climate in which they work, the skills they consider most valuable, how well they fit their jobs, and about future plans.

The findings have broad implications related to the fuller utilization of educated and talented women in society. Particular insights have been provided about women's careers and how they differ from men's; about administration in higher education and the skills that women bring to that endeavor; about the position of women in academic institutions and their qualities as workplaces; and most important, about the nature of women's professional achievement, with common themes suggesting that both motivation and opportunity can be shaped to fit personal visions of success.

TESTING EQUITY IN SALARY AND WORKLOAD AT YOUR INSTITUTION

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Salary and workload equity remain a key concern in our institutions. A tradition seems to be developing to address these questions with a linear model, either regression or analysis of variance. The basic difficulty with such statistical approaches comes from the disproportionate representation of minority groups in specific curricula, for different curricula traditionally have different instructional patterns and different salaries. This disproportionate representation causes unbalanced cell size in the ANOVA designs used to test differences and requires the inclusion of a large number of variables in the regression designs which indirectly tests differences. Another difficulty with regression analysis is that it allows only one criterion for each analysis. This is a serious problem when investigating a multivariate concept such as the instructional workload of faculty.

This paper proposes an alternative design based on the "typical" same-sex faculty in each department. In addition, it goes through the various major procedures in ANOVA/MANOVA, a single treatment of SEX, two treatments of College and Sex, a balanced design (by department) for SEX, and a paired 't' test (by department) for SEX. While salary is analyzed the major aspect of the paper involves an analysis for workload where workload is measured by thirteen different measures. These measures include weighted student credit hours, didactic (contact) hours, unique courses, number of sections, and contact hours by level (lower, upper and graduate) and type (lecture, laboratory and research) of course. The sample consisted of 402 nontenured assistant professors.

The paper reviews appropriate procedures to test for equity in salary and workload and cautions on the use of certain statistical techniques which could lead to erroneous conclusions.

STATISTICAL METHODOLOGIES

Chair: Richard D. Howard, West Virginia University

PAGE

Presentors: Carol Kayla, Virginia Eman Wheeless, Richard D. Howard, West Virginia University, "Student Evaluation of Graduate Programs in Selected Southern Universities." 22

Robert M. Ussery, William H. Collins, Yuan-Hsi Hsu, Carol B. Collins, East Carolina University, "A Markov Chain Application to College Admission Policy." 23

Virginia Eman Wheeless, Lawrence R. Wheeless, Richard D. Howard, West Virginia University, "Assessment of Job Satisfaction Correlates Among University Classified Employees." 24

This session will present different statistical methodologies available to institutional researchers in order to analyze the data more effectively. Among the statistical approaches used are: the Markov Chain application, factor analysis, and canonical correlation. The results of empirical studies using those statistical applications will be discussed and the strengths and weaknesses of various statistical packages will be noted.

STUDENT EVALUATION OF GRADUATE PROGRAMS IN SELECTED SOUTHERN UNIVERSITIES

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Planning and budgetary issues and education accountability have increased the demand for higher education program review. Program reviews help determine a program's quality or weakness and provide a means to show support for the program's continuation, enlargement, or termination. Currently, the majority of the data collected for program reviews is concerned with enrollment, FTEs, costs, and number of degrees awarded. Although the need for such information is unquestioned, further subjective evaluations by faculty and students would provide valuable sources of data for program evaluations. The purpose of this investigation was to examine current student evaluation procedures of graduate programs and propose a valid measure for collecting graduate student evaluations.

In order to determine typical types of evaluations conducted and the areas evaluated, two populations were surveyed. First, members of the Southern University Group of 25 were asked to indicate if exit interviews and/or surveys of graduate students or alumni were conducted at their university and what other types of program evaluations were conducted. Of the 25 universities, 23 responded with only 7 indicating they conducted graduate student exit surveys or alumni surveys. Second, the 81 graduate departments with 75 masters and 29 doctoral programs at West Virginia University were asked to indicate the type of graduate student evaluations conducted and to return a copy of such evaluations.

From these two surveys, a list of 55 topics for evaluation of graduate programs was generated. This list was reduced to the categories of curriculum, academic advising, administrative procedures, faculty and teaching, university facilities, and learning environment. A 48-item, self-report, Likert-type Graduate Student Program Evaluation instrument was developed to obtain graduate students' evaluations of these areas.

In a pilot study, 100 graduating master's and doctoral students completed the instrument. The statements were factor analyzed to determine if the items clustered in the designated categories and to determine which items best measured the areas of concern. Reliability coefficients were also computed and data differences and similarities by degree (master's and doctorate), age, gender, and months to complete degree were analyzed. The results of the pilot study produced a shortened version of the Graduate Student Program Evaluation and it is suggested that such an instrument could easily be adopted by universities as a method of providing additional information for program review.

A MARKOV CHAIN APPLICATION TO COLLEGE ADMISSION POLICY

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Markov chains have been used to study the evolution of systems over repeated trials and to model manpower supply. The purpose of this paper is to demonstrate the relevance of the Markov chain model to admission policy for any four-year college. The objective of the policy is to produce a predetermined number of college graduates in the future and at the same time to keep the size of the student body at a desired level while maintaining a smooth growth rate.

Enrollment trends and growth regulation are major factors in higher education planning. Regulation of admissions is the major tool a university uses to regulate growth since once students are admitted few acceptable or even effective actions can be taken to eliminate them (e.g., decreasing the amount of financial aid to students or moral suasion to encourage professors to fail marginally performing students).

In this investigation empirical data are collected to determine the transition probability matrix of the Markov chain. Expected values for numbers of graduates and drop-outs are computed. Optimal admission policy is then derived to realize the desired number of graduates, to make up the loss, and to accommodate the growth.

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ASSESSMENT OF JOB SATISFACTION CORRELATES AMONG UNIVERSITY CLASSIFIED EMPLOYEES

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A university/college can be described as a complex organization with predetermined goals and objectives. Applying findings of organizational behavior in business and industry can help identify factors contributing to employee satisfaction in the university. The purpose of this investigation is to investigate communication variables which are associated with job satisfaction in university administrative units.

These variables of management communication style, supervisor's receptivity to information, and communication with supervisor satisfaction constitute a correlated concept of perceptions of supervisor's communication and it was hypothesized that: A linear composite of management communication style, supervisor's receptivity of information, and communication with supervisor satisfaction is positively related to a linear composite of satisfaction with work, pay, promotion, supervision, and co-workers.

Subjects for this study were 103 university employees in three administrative units at a comprehensive eastern university. The data was analyzed using a canonical correlation analysis. Further analyses examined the relationship of salary, years of service, age, and office of employment to job satisfaction.

Results of this investigation support the hypothesis that communication variables are related to job satisfaction. Although such results do not demonstrate causal relationships, they do indicate that changes in communication behavior and management style could affect job satisfaction. Although there are conflicting results concerning the specific effect of job satisfaction on productivity, there does appear to be a significant relationship. Thus, by changing the communication of the supervisor, productivity of university administrative staff could be improved and the goals and objectives of the university could be better met.

EVALUATION

Chair: Mantha Vlahos Mehallis, Broward Community College

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	Dallas R. Fox, Winthrop College; Jeffrey Keltz, University of Florida; Wayne Bottomley, Embry-Riddle Aeronautical University, "College and University Cost/Productivity Models for Administrative Areas: Case Study: Student Financial Aid."	27
	Karen R. Johnson, Alton L. Taylor, University of Virginia, "Costs, Benefits, and Effectiveness of an Outreach Graduate Nursing Program."	28
	Albert Lynd and Randall R. Powell, Missouri Department of Higher Education, "Measurement of Quality in Off-campus Credit Programs: A Non-intrusive Approach by a State Agency."	29
	James L. Morrison, University of North Carolina at Chapel Hill, "Policy-Impact Analysis: Implications for Institutional Research."	30
	James E. Prather, Michael L. Clemons, Georgia State University, "Library Resources of a Metropolitan University--Assessment by Users."	31

This session will be a forum of discussion on evaluation. There will be studies that examine costs and effectiveness, quality issues, academic services, programs, self-study procedures and a policy-impact analysis. All of these studies incorporate evaluation and assessment and the techniques will be outlined. The importance of evaluation in the context of institutional research will be a focus.

DEVELOPMENT OF A PLANNING, BUDGETING, AND EVALUATION MODEL

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Linking academic priorities to resource decisions was attempted by Lawless, Levi, & Wright (1978) at the University of Houston. As a result of the institutional accreditation self-study required by the Southern Association of Colleges and Schools the university took advantage of an obvious opportunity. This opportunity centered around objectively reevaluating and redefining its institutional mission, reappraising its financial and physical capabilities, and determining the role to be played by each of its disciplines and their respective programs in successfully fulfilling the multi-various demands of its mission.

The University of North Carolina at Asheville finds itself in a situation similar to that at Houston. The institutional self-study initiated at the request from SACS provided the university with the opportunity to develop a model for planning, budgeting, and evaluation of academic programs. The model is referred to as an "academic audit".

The academic audit model is essentially a model for planning resource reallocation in conjunction with redefining and re-establishing institutional goals and mission statements. Priorities for budgeting are set as a consequence or outcome of the auditing process. The model is cyclical in that an obvious outcome of the entire process would be a demonstrated need to perpetuate the model.

The proposed academic planning, budgeting, and evaluation program (academic audit) consists of three phases. The first phase involves compiling extensive data on student enrollment patterns, grading tendencies of faculty, etc., and merging that information with budget data such as faculty salaries and expenditures for equipment and supplies.

The academic audits of each academic program would serve as the primary information source used by a joint faculty-administrative advisory committee in the second phase of the program, academic planning. Using the university's goals and objectives as a guide, recommendations could be made by the advisory committee as to the status of present programs, the need for any reallocation of funds, and the availability of monies for any new programs. Once their recommendations are considered and acted on, the third phase would be one of program evaluation and review. This third stage essentially would entail annual updating of the initial academic audit, a review of the program's progress in achieving stated objectives, and recommending any changes in funding.

COLLEGE AND UNIVERSITY COST/PRODUCTIVITY MODELS FOR ADMINISTRATIVE AREAS: CASE STUDY: STUDENT FINANCIAL AID ADMINISTRATION

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A recent search of literature in institutional research has shown that little or no work has been done to identify, compare or predict what college and university administrative costs are or should be. This study was undertaken to determine what could be done to identify and quantify such relationships in one administrative area.

The intent of this study was to identify the institutional programmatic and workload factors that have influential effects on the costs of administering the Student Financial Aid service. A theoretical and quantifiable understanding of these relationships permits prediction of funding requirements and inter-institutional comparisons to be made.

It was expected that student financial aid administrative expenditures and staff size would vary directly with such workload factors as the level of enrollment and the number of financial aid awards granted, etc. The relationship between institutional characteristics and workload factors on staffing requirements was also examined. The results of the study are generalized models of expenditure and staffing requirements as well as descriptive statistics on the Student Financial Aid service.

This is but one of several administrative areas of colleges and universities which can and should be examined to encourage the effective use of resources in higher education.

COSTS, BENEFITS, AND EFFECTIVENESS OF AN OUTREACH GRADUATE NURSING PROGRAM

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A southern University has conducted an off-campus curriculum leading to a master's degree in nursing since 1977. The program was implemented as an effort to upgrade and enhance the level of nursing practice and education in a remote part of the state. Nursing faculty, traveling from the main campus, provided off-grounds instruction in clinical, educational, and administrative content. The program has attracted students, who for various reasons, are unable to enroll in the regular on-grounds program.

In order to assess the success of the program, a cost, benefit, and effectiveness evaluation was designed. The evaluation involved collection of data in the area of financial costs and benefits to faculty, administrators, and the student clientele. More extensive data were collected via surveys and personal interviews to assess less tangible, but often more important "real" costs of the program. Those costs included the problems in role conflicts and personal sacrifices undergone by students who participated in the program; the stress on faculty to maintain on-campus quality in the off-campus setting; and drains of faculty and University resources resulting from the commitment of time, funds and personnel to a program offered in a remote area of the state. The evaluation also yielded data which will assist in future off-grounds projects as well as in making modifications in the on-grounds program offerings.

MEASUREMENT OF QUALITY IN OFF-CAMPUS CREDIT PROGRAMS: A NON-INTRUSIVE APPROACH BY A STATE AGENCY

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In July, 1977 the Coordinating Board for Higher Education (CBHE) authorized the establishment of a Task Force on Off-Campus Education with the charge of addressing two primary issues: duplication of course offerings and quality of course offerings at off-campus locations. The task force developed a set of guidelines which would serve to ensure that reasonable standards of quality are being met. In addition, the task force recommended the establishment of three regional coordination councils, each of which endeavors: to provide coordination of course offerings; to prevent the unnecessary duplication of courses; to work for the sharing of library resources, computer facilities and other academic support services; to serve as a means for the identification of unmet needs in off-campus educational opportunities; and to serve as the monitor of the guidelines developed by the Off-Campus Task Force of the Department of Higher Education (DHE). The Department provides general oversight of the activities of the several councils and lends advisory and consultative services to ensure the continuity and success of the councils. As a result of the concern over the quality of off-campus offerings, the CBHE adopted a set of guidelines designed to address the quality dimension and to offer a suggested approach to improving the coordination of offerings. In early 1980, the representatives of the three Regional Coordinating Councils agreed that each institution should conduct a self-study of off-campus activities. The format of the self-study was to follow the guidelines which addressed the following areas: determination of courses to be offered; standards of credit courses offered at off-campus locations; faculty; administrative organization and academic policy; resources and facilities; and student services. The DHE staff subsequently reviewed each self-study and prepared an analysis which was submitted to the institutions and to the CBHE. Although the regional councils were charged with monitoring quality in off-campus offerings, the activities for the past three years have focused on the survey of off-campus offerings conducted by the DHE. The data collected in the survey include course title, HEGIS classification, course number, credit hours awarded, enrollment, status of the faculty (full-time/adjunct) and location of the course. The staff of the DHE reviews each institution's response and prepares a final report. The results of the surveys are shared with the institutions in each of the three regions and serves as the basis for discussion at the regional meetings.

POLICY-IMPACT ANALYSIS:

IMPLICATIONS FOR INSTITUTIONAL RESEARCH

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The purpose of this paper is to introduce a model for developing and assessing institutional policies in higher education. As such, this model provides a framework within which a variety of futures research techniques are tied to policy development, implementation and evaluation. The utility of the model is that it structures communication between those developing information about the future and those responsible for policy formulation and decision-making in such a fashion that policy-makers can choose among alternative policies based upon the probable impact of each.

There are four stages in the policy-impact analysis model: monitoring, forecasting, goal-setting, and policy analysis and implementation. Monitoring refers to the identification and selection of issues of concern either to policy-makers or scholars. Forecasting involves using a variety of futures research techniques (mathematical, judgemental, and probabilistic) to forecast the future for selected issues, specified as indicators, variables, or trends. In response to the projected trends of indicators in these areas, policy-makers then establish goals, the third stage of the model. In essence, this stage involves identifying the desirable future. This leads to the fourth stage of the model, analysis and implementation of policy to achieve those ends. In this stage, a variety of possible policies are analysed in order to determine their probable impact, and are ranked on those characteristics deemed important, e.g., relative costs versus benefits. Those policies ranked at the top are then implemented. Evaluation occurs when the stages of the model are iterated, using additional analyses and further refinements.

It should be noted that the more advanced probabilistic forecasting methods have been developed only within the last decade or so, and depend upon the ability of the IR staff to (1) identify those events which may affect a trend directly or indirectly, (2) accurately assign subjective probabilities to those events, and (3) design and obtain a reliable and valid base of indicators. The efficacy of the model is dependent upon the close interaction of the staff and decision-makers within each stage of the model. Given these conditions, this model uses the most advanced technology available in contemporary social science in a rational approach to provide policy-makers more reliable information about possible futures, and how to use that information to achieve a more desirable future.

LIBRARY RESOURCES OF A METROPOLITAN UNIVERSITY--ASSESSMENT BY USERS

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Colleges and universities can measure the extent to which their libraries effectively serve the needs of students, faculty, and others. Obtaining this information is valuable for policy-making, especially for justification of the allocation of financial resources for general library operations and specific programs.

At the request of a university senate committee, a survey of a random sample of library users of a major urban university was made during winter 1981 to support planning. Over a nine-day period, 3,356 users responded to the survey.

Survey Methods. The questionnaire was designed to yield information pertaining to these areas: (1) primary materials used during the visit; (2) purpose for visiting the library; (3) institutional affiliation and status; (4) major field of study; (5) residential location by zip code; (6) frequency of usage; (7) extent to which library services and facilities meet needs; and (8) adequacy of photocopy facilities.

The independent variables used were the characteristics of library users, including institutional affiliation and status, major field of study, and residency. These characteristics were cross-classified with the dependent variables, which included materials sought, purpose, frequency of use, needs met, and adequacy of photocopy facilities.

Survey Results. The analysis revealed that 85% of all respondents were affiliated with the university, and the majority (80%) were students. Users not affiliated with the university generally sought books, magazines and journals. However, many university users indicated a non-traditional use of the library--a place to take a nap, meet a friend, use the telephone, or to have a social gathering.

Thirty-four percent of the respondents use the library daily, 46% weekly, and 12% monthly. The services and facilities of the library were found to meet "all" needs of 34% of the respondents and 55% indicated that it met "most" needs. Humanities users were most likely to be seeking books; business administration, social sciences, and education users were more likely to be seeking magazines and journals. Most thesis or dissertation research was by users in social sciences and education. Twelve percent of all users were leisure readers. Two-thirds of all users indicated that photocopy facilities were adequate. Residential patterns of users revealed that the greater the distance that users lived from the library, the greater the tendency to rely on the library as a resource for books and journals, a place to study, do personal research and leisure reading.

Implications. Public dependence and reliance on the centrally located and accessible university library indicates an important community service not generally recognized nor specifically funded. The unexpectedly large amount of non-traditional usage suggests a need for more quiet or private places either in or apart from the library where students can collect themselves.

TOOLS OF INSTITUTIONAL RESEARCH

Chair: Elizabeth F. Fox, University of Alabama in Birmingham

Presentors:		PAGE
	Richard H. Barbe, Robert O. Michael, Georgia State University, "The Practice-Theory-Practice Model: The Establishment of the Theoretical Bases of a Case Study."	33
	Charles Hopkins, Margaret Sullivan, Georgia State University, "Organizational Change: Implications for Institutional Research".	34
	R. Gregory Litaker, University of Louisville, "Modeling With Microcomputers."	35
	Michael T. McCord and Jessica Lee, West Georgia College, "Providing Critical Planning Information at Smaller Institutions".	36
	Dianna B. Morris, East Carolina University, "Constructing an Activity Matrix for Institutional Research."	37

This session will focus on the role of institutional research--both traditional and new. The topics to be discussed include: the construction of an activity matrix for institutional research; modeling techniques in institutional research; organizational changes and their impacts on institutional research; and the provision of critical data by institutional research at a smaller institution. The session will be of interest to both newcomers to institutional research and experienced institutional researchers.

The Practice-Theory-Practice Model: The Establishment of the Theoretical Bases of a Case Study

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An excellent method for describing the change process in higher education is the case study. Usually a straightforward cataloguing of actors and events involved in change processes, the case study can prove to be a rich source of practical and theoretical implications and suggestions for researcher and practitioner alike. The material presented as a case study, however, often fails to be adequately grounded upon a solid theoretical base. This causes the product of intensive research to be of tremendous worth to the organization and actors involved, but to be of little merit in terms of the general field of institutional study.

The range of case study applicability needs to be expanded beyond the specific events and setting upon which the study is based. Theory must be used as foundation for the study and as a point of similarity or likeness between the change process at the research site and the change processes at other institutions. With the establishment of the proper theoretical foundation for the study, either the entire case study or significant portions of it can provide important meanings and lessons for administrators and researchers in institutions undergoing similar change processes.

With a solid foundation of theory supporting an institutional change case study, not only does the reported information become more robust or richer in meaning, but its potential applicability to other settings and structures is also increased. What emerges is a practice-theory-practice model of the case study and general research applicability which allows for greater and wider use of the original research material. For example, the major reorganization of a large university has produced issues, events, actors, and outcomes which can be analyzed in terms of political, social, or economic models of institutional change and individual behavior. The interpretation of this organizational change using power, alienation, and/or political models, for example, can establish the theoretical foundations for the study and for the interpretation of its significance to the institution being researched and to other institutions undergoing changes which can be identified with similar theoretical models.

Thus the movement from the initial researched practice or event to the theoretical base is carried one step further through the practice-theory-practice model to the practice stage. The identification of the common theoretical threads which bind this original study to the concerns of administrators and researchers at other institutions makes a seemingly distant and unique set of events take on a richer and more direct meaning and impact. The proposed paper will discuss this practice-theory-practice model utilizing the initial research findings of the study of the aforementioned major university reorganization.

Organizational Change: Implications for Institutional Research

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Contemporary social, economic and political pressures on higher education are producing changes in the administration and curriculum of colleges and universities. Institutional researchers need to be able to assist their institutions by collecting data describing the variables that initiate organizational change and the dimensions, outcomes and management of the change process.

Most organizational research focuses on planned change where goals or outcomes are specified within a business or "for profit" setting. This research has limited application to a university setting that involves faculty in a collegial governance model and where profit is not a criterion for evaluating the effects of change.

A research study is currently in process which examines psychological, sociological, political and economic factors in the change process. Methodology in this study is the major focus of the paper. Issues are discussed which have value to institutional researchers.

Areas of discussion include:

(1) When sensitive studies are planned and conducted, in-depth cooperation is essential in the planning stage between the research offices and the units involved in the study.

(2) Diverse academic views are helpful on planning and support study committees.

(3) The interview method is a successful survey technique when investigating sensitive issues. Trust, confidentiality, independence and objectivity are essential. This study would suggest that the interview is becoming a positive influence in the organizational change. As such, the data are influenced by the methodology.

(4) Organizational change is a developmental process. The design of the study should provide for the observation of several variables over time.

(5) Management change can be described by many models; therefore, research techniques and theory from sociology, communication, political science and psychology are helpful in viewing the change process. It is beneficial to include a multidisciplinary group of professionals in discussion throughout the research.

(6) Institutional administrative changes occur within a historical and economic context. The research should be reported within the same context.

(7) An editorial board is essential when writing results of a sensitive study.

The paper describes a collegial approach to institutional research which is particularly helpful in understanding the complex issues involved in institutional reorganization. The findings of the study will be used and interpreted as they relate to methodological questions.

MODELING WITH MICROCOMPUTERS

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Developing and implementing computer-based models for planning and research in higher education have historically been time-consuming activities which in most cases required significant amounts of technical expertise. The process of creating a model which takes advantage of the speed and accuracy of the computer can be a major undertaking. The development can include significant investments in computer programmer time, computer usage time, time to learn how to use one of the various simulation packages, or the purchase and/or lease of modeling software available from some other computing facility. Ever after all of this investment, the ease of entering baseline data or changing some parameters to see "what if" could be a frustrating exercise. A need seems to exist for a way to more easily and less expensively develop computer-based models for use in planning and analysis.

The recent development and marketing of a computer program for microcomputers may have provided a way to reduce much of the burden and technical expertise previously required in model building. This program was designed for use in accounting practices but its capabilities in the area of forecasting make it well suited for generalized modeling. The program requires no user programming skills and was designed for easy parameter manipulation for instant analysis of alternate strategies. Additionally, this program is available for all major brands of microcomputers, and provides for easy exchange of information between users of different computing equipment.

This paper will illustrate some of the uses of this computer program for developing models in an institutional research environment. Several working models will be illustrated. The limitations and potentials of the use of microcomputers for modeling will be discussed.

PROVIDING CRITICAL PLANNING INFORMATION AT SMALLER INSTITUTIONS

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When a research office at a small institution is confronted with an executive request for "information useful for planning purposes", a dilemma is immediately created around the necessity to evaluate what is useful or nonuseful information. Problems which hamper solving this dilemma are the facts that: (1) the research office often does not have direct access to the key executive, thus resulting in communication problems, and (2) former information collected by the research office is likely to have been done on a special request basis with the appearance of being needed only one time. Further complications exist in the form of limited personnel and resources available to utilize in gathering planning data.

The paper presents the process utilized by one research office to distinguish the "useful" information from the superfluous. This consisted of defining five major categories within which essential data was identified. In each of the categories a separate method was employed to gather information dependent upon the availability of data pertinent to that category. A data-production schedule was established with daily and weekly deadlines to result in a complete compilation of the data within a six week period. The outcome was to produce a flood of data in one of the areas, moderate data in three of the areas and almost totally subjective data in the final area. Problems were encountered in determining how to present or report the data clearly and succinctly, yet completely. Likewise, the depiction of interaction overlap and implication of bits and pieces was hampered by a lack of sophisticated computer programming capability. The means by which this information was narrowed into a distinct packet of planning information is identified. The planning packet was utilized by the key executive to present faculty and administrators with an orientation to the current status and future direction of the institution. The paper concludes by identifying critical components of the process employed in providing planning information to the institution's top administration.

CONSTRUCTING AN ACTIVITY MATRIX FOR INSTITUTIONAL RESEARCH

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The Institutional Research Activity Matrix has many applications for planning and management. It is of special value to new-comers in institutional research.

An analysis of all institutional research projects, reports, and activities was conducted with attention to all offices, departments, and units involved in any aspect of either supplying data to or receiving data from an institutional research office. This information was used to construct a matrix with the units and departments down the left margin and meaningful categories of activities across the top. The body of the matrix contains symbols showing the flow of data used in various activities to and from the units/departments.

The activity matrix provides an overview of all institutional research functions, data needed, and which units are involved. The matrix is valuable in planning and management of office functions, coordinating activities, monitoring where resources are being utilized, and displaying where resources are not being expended and perhaps should be.

PLANNING AND MIS

Chair: Joseph G. Rossmeier, Northern Virginia Community College

Presenters: M. Olin Cook, Arkansas Tech University, "Formalized Initial Long-Range Planning." 39

Vicki M. Curby, University of Missouri-Columbia, "Use of Public Opinion Surveys in Institutional Planning." 40

James A. Henderson, Jr., Midlands Technical College, "The Management Side of MIS." 41

Maryann Steele Ruddock, St. Edward's University, "Use of a Market Survey in Identifying Potential Publics." 42

Robert M. Ussery, J. M. Joyce, East Carolina University, "The Importance of Good University Information Systems for the 80's." 43

Kenneth L. Wood, Susan Hawthorne Wood, Western Carolina University, "Are Corporate Stretegic Planning Techniques Useful in Public Higher Education?" 44

Planning will be addressed from different perspectives. Among the areas of discussion will be: long-range planning, the need for good planning information, the uses of public opinion surveys, the use of MIS, and the corporate planning techniques as they compare to higher education planning exercises. Data needs, methodologies, and results of planning efforts will be topics of exchange at this session.

FORMALIZED INITIAL LONG-RANGE PLANNING

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The first formalized planning process for Arkansas Tech University began with the President and Administrative Council deciding that the institution needed to undertake an academic planning process to cover the next ten years. The Executive Vice President was charged with this responsibility. After initial discussions it was decided that a general consultant would be employed to assist institutional personnel during the process. An Advisory Committee representative of the institution and the institutional service area would be formed and utilized heavily throughout the process.

It was initially understood that the long-range planning process would be designed to furnish a forum for discussion about the future of Arkansas Tech. Results of the discussion, data collection, and committee work would lead to a document which would outline directions and priorities for the 1980's. After involvement in the process, hopefully these directions would be understood by faculty and staff and there would be motivation to carry out recommendations. Flexibility throughout the planning period would be most important since all appropriate action could not possibly be determined in the beginning of the process.

After a general consultant was selected, he was brought to the campus to meet with various groups to discuss the necessity of planning. He talked with the Advisory Committee at their initial meeting while on his first visit. An outline of the proposed planning document was also developed during this visit and a plan of attack for the planning process was begun.

The initial input into the plan was through twelve (12) study committees composed of institutional and community persons selected for their particular expertise and also to be representative of the institution. Responsibilities for each committee were written and given to each chairperson. Work of these study committees was coordinated by the Executive Vice President and progress reports of their work were given to the President, vice presidents, Board of Trustees, and Faculty Senate periodically. The first two committees to complete their work were mission and role and background and demographic information. It was felt that a new mission and role statement along with demographic information were needed for a common point of departure.

Study committee chairpersons compose the Steering Committee. This group is charged with the review of all study committee recommendations prior to the drafting of a long-range plan. After the plan is drafted it will be reviewed by the President and various administrators, faculty committees, and the Board of Trustees. When reviews are completed and the plan is adopted by the Board of Trustees, implementation will begin.

USE OF PUBLIC OPINION SURVEYS IN INSTITUTIONAL PLANNING

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One planning activity for a college or a university is the assessment of its strengths and weaknesses. Use can be made of information regarding the public's opinion of an institution in order to learn about its current status and plan what it should do in the future. In 1980, the administration of Columbia College in Columbia, Missouri, decided to engage in a long-range planning effort. Like many small, private institutions, it was facing difficult times and needed to better direct its activities. A long-range planning committee was appointed. Robert Cope's strategic planning process was chosen as the model to be used for planning. As a part of the planning process, Cope suggests that a college learn where it is and what it is. An identification of the strengths of the institution and the assets in the community which provide a definite advantage in carrying out its mission is needed. A public opinion survey conducted by mail was selected as the method to be used to determine the public's opinion of Columbia College.

The population for the survey was the registered voters in Boone County, Missouri. A random sample of 900 people registered to vote in the county was selected for this study. A questionnaire, Public Opinion Survey/Columbia College, was designed to collect the data needed for the study. The first question served to eliminate those who had not heard of Columbia College. A second question obtained opinions regarding descriptive words that apply to Columbia College. A third question ascertained knowledge of the type of programs offered at the school. In the fourth question, the public was asked to agree or disagree with various statements which might apply to this institution. The respondents were asked to relate their sources of information about the college in the next question. They were also asked to indicate the most important source of information. After questions regarding their opinion of the strengths and weaknesses of Columbia College, those questioned were requested to provide demographic information.

The questionnaire, with a letter explaining the purpose of the study and asking cooperation, along with a pre-addressed, stamped return envelope was sent over a prominent attorney's signature to the sample of registered voters. The surveys were mailed in November, 1980. After two follow-up mailings, the final response that was in by later January, 1981 totaled 593 questionnaires which represented 75% of the 804 surveys that were deliverable.

When the questionnaires were returned, they were checked to identify the usable ones and coded in preparation for statistical analysis. Frequency distributions on all items of information were computed using the Statistical Analysis System, 1979 Edition.

The report of the findings from the survey included a description of the respondents, summary of results of the study, a discussion of the information collected, conclusions that could be drawn from the research, and recommendations for the college. The planners at the college felt that the information was useful to provide them with objective information to use in their planning so that they would not have to rely solely on their own impressions and feelings about their institution.

THE MANAGEMENT SIDE OF MIS

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All too often the need for a Management Information System is presented in terms of organizational efficiency and better decision making. However, the feasibility studies and technical reports developed during the project design stage overlook the organizational climate in which the system will operate. Even with the increasing use of user oriented task forces and other participatory devices, little attention is placed on the impact of the MIS on the established patterns of behavior and authority within the organization. This contributed paper explores the problems encountered in MIS development and utilization when organizational considerations are excluded in project design and implementation.

The outline of the paper would focus on the experience of two community colleges -- a large metropolitan multi-campus institution and a small single campus institution. The larger institution has a well developed in-house computerized information system and staff. The system is functioning at a high level in meeting the information needs as outlined in the institution's planning documents. The small school has no such formal system. As part of a four school consortium, the small school is trying to identify, document and systematize its basic information needs. The disparity between these two academic settings hides the common fact that the top and middle managers at each institution have not yet utilized the information systems available to them. The existence of an elaborate information system has not assured better management decisions, or even acceptance of the system itself and its implications for the future, while the lack of such a system at the other institution has led to firmly entrenched information bases and methods of operation unique to each manager. In both cases, the resistance to change was greater than anticipated in the project design stage resulting in less than optimal success in the final outcome.

The paper will present citations from previous field studies and other research efforts reporting on similar issues. While the literature on the management side of MIS is still limited, the authors have found a suitable number of studies in many different organizational settings to document the problem. The paper will then provide an account of the process followed by each institution in the development of each project. The remainder of the paper will focus on the common problems encountered in each institution and how each has tried to overcome the problems of overlooking the management side of MIS. A final section will discuss the possible problems in the upcoming advances of data based management systems.

USE OF A MARKET SURVEY IN IDENTIFYING POTENTIAL PUBLICS

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The threat of declining enrollments has forced many schools to take a closer look at themselves. Why the current students decided to enroll there and how the community views the school are but two ways to determine what the school's audience is. This is especially important when there is more than one university in the same city. While it is generally conceded that the schools do not actually compete for the same students, the school that knows how it is perceived by its public will be better able to structure its recruitment and advertising programs. A market survey is one way to find out how a school is perceived.

In the Spring of 1981, St. Edward's University, a small (1,525 FTE), private, liberal arts university located in a medium sized city (350,000 pop.), which also contains the main campus of the University of Texas System, a large community college, and two private colleges, undertook a market survey of the Austin Area. Five major groups were targeted: current seniors at SEU, high school seniors in the general Austin vicinity, SEU alumni, the general public, and a group of middle-management people. It was felt that these groups represent the spectrum of involvement with SEU -- involved in the past, present and potentially in the future.

Three major types of questions were asked: knowledge of the school, opinions on what is important when choosing a school, and demographics.

The methodology for the survey was to conduct telephone interviews of 300 people from each of the five subgroups. Interviewers were SEU students who had undergone training in telephone interview techniques. They were paid on a per completed survey basis. Frequency counts and crosstabulations were used to analyze the data. The Institutional Research office contributed to the writing of the survey instrument, as well as handling the logistics of the data collection, and the data analysis.

Questions to be answered by the survey:

A. Are there any differences between the groups in how SEU is perceived?
B. Are there any misconceptions being held about SEU?
C. What attracts people to SEU?
D. What does not attract people to SEU?

Uses for the data:

A. Determining if recruitment strategies are properly focused.
B. Determining if publicity strategies are properly focused.
C. Determining if there are any needs in the community that SEU could fulfill. Is there a public that we are not tapping?

THE IMPORTANCE OF GOOD UNIVERSITY INFORMATION SYSTEMS FOR THE 80'S

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Some of the present effects of poor information systems are: Mandatory reporting has become difficult and time-consuming. This has lead to decreased productivity for administrators and, of late, faculty. Most of these reports reflect on decisions made in the past. This often has the effect that non-mandatory reports that might be crucial to present and future planning are not done. Secondly, in such an environment executive decisions are made that are incorrect, inappropriate, or, at the very least, lacking in full knowledge of the real cost and/or impact of such decisions. Thirdly, many problems of an "emergency" nature arise. These are usually reactions to unforseen impacts of decisions which, with good planning based on good information, could be alleviated or eliminated.

In the future one expects mandatory reporting to increase. Increased accountability, zero-base budgeting, and program reviews are some of the reasons for this increase. Executive decisions and goal-setting will become more critical in an era of declining traditional student population, of increased competition for students, and of declining real resources. The growing complexities of the milieu in which the university must operate will confront the executive with more "emergency" type problems which will further impact constructive planning.

Some major steps toward improved information systems include: recognition of the problem by high-level administrators, recognition that information is a resource which must be managed, and insistence that managers at all levels not abdicate to supporting technical personnel their responsibility for managing information. Some specific steps that can be taken by high-level administrators are as follows: clearly state the goals and objectives of the university, recognize the constraints on the university, insist on institutional planning, define clearly what processes are carried out by which offices, and establish policies in regard to responsibility for and access to information.

ARE CORPORATE STRATEGIC PLANNING TECHNIQUES USEFUL IN PUBLIC HIGHER EDUCATION?

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Long-range or strategic planning has changed significantly in higher education during the last decade. During the 1965-75 period of large enrollment growth, the major thrust of planning activities was to meet instructional requirements by providing estimates of faculty members and space needs. Since 1975 this enrollment trend has slowed nationwide and, in certain geographical areas, has declined. This decline is anticipated to accelerate drastically, bottoming out in the 1985-87 time interval. Concurrent with this decline, significant shifts in student preferences in fields of study have occurred. National and state funding attitudes have further complicated the resource allocation dilemma. Change will occur in public higher education in the 1980s, whether planned or not.

To survive this period of potential radical resource decline and academic change, the chief executive officer of each institution must make the best possible decisions in a timely manner. Long-range or strategic planning techniques may assist the chief executive officer in making these decisions.

This paper will deal with the adaptation of the current "state of the art" in United States business corporation long-range planning techniques by public colleges and universities. The "state of the art" will be developed by reviewing literature concerning relevant corporate strategic planning methods from the 1950s to the present. From these approaches, selected techniques will be recommended for employment in public institutions of higher education strategic planning efforts. Some of these techniques may be useful to private colleges and universities but is beyond the scope of this paper. This paper will show that corporate strategic planning techniques may be useful to the chief executive officer of public institutions of higher education in coping with the turbulent 1980s.

STATEWIDE INSTITUTIONAL RESEARCH

Chair: Jean C. Keating, Virginia Council of Higher Education

PAGE

Presentors:
Randall W. Dahl, Kentucky Council on Higher Education, "The College Choice of Kentucky High School Graduates: Results of the First Follow-up of the Kentucky Longitudinal Study." 46

Robert L. Dean, Kentucky Council on Higher Education, "State Support, Student Enrollment, and Tuition Charges in Kentucky Public Higher Education, 1971-1980: A Decade of Changes." 47

Fred E. Kiehle, III, Governor's Committee on Postsecondary Ed., Atlanta, Georgia, "The Use of State-level Goals as the Basis for Assessing Postsecondary Education Performance." 48

Ronald A. Mann, J. Kenneth Walker, Kentucky Council on Higher Education, "Attrition, Retention, and Transfer within the Kentucky System of Public Higher Education." 49

Joseph L. Marks, Governor's Committee on Postsecondary Ed., Atlanta, Georgia, "Assessment of Unmet Student Financial Need." 50

J. Kenneth Walker, Roger D. Baker, Kentucky Council on Higher Education, "Age and Sex Enrollment Patterns in Kentucky Institutions of Higher Education 1978-79." 51

This session will address institutional research studies as conducted by state agencies. Among the areas of analyses to be discussed will be: statewide student attrition, retention and transfer; state support, student enrollment and tuition charges using an indexing technique for comparative purposes; a longitudinal study regarding the implementation of educational plans and specific institutional choices of high school students; age and sex enrollment patterns of students in institutions of higher education; a process to develop a set of statewide postsecondary education goals; a state financial aid study.

THE COLLEGE CHOICE OF KENTUCKY HIGH SCHOOL GRADUATES: RESULTS OF THE FIRST FOLLOW-UP OF THE KENTUCKY LONGITUDINAL STUDY

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This paper presents results from the follow-up phase of the Council on Higher Education's Kentucky Longitudinal Study regarding the implementation of educational plans and specific institutional choices of May 1980 Kentucky high school graduates, and analyses of the relationships between these results and a wide range of personal background characteristics, high school experiences, and future plans.

The Kentucky Longitudinal Study was initiated in April 1980 with the statewide administration of a survey of educational and career plans which was completed by more than 30,000 May 1980 graduating seniors in Kentucky public and non-public high schools. In late 1980 a follow-up survey was completed by 2,600 May 1980 graduates participating in one of three follow-up samples, including one special sample of "high ability" students as reflected by ACT scores. Subsequent follow-up surveys will be administered annually.

With regard to the implementation of educational plans, the general results reveal that 87 percent of the 1980 graduates who planned to enroll in a postsecondary educational institution actually enrolled, and that 20 percent of the graduates with non-education plans (primarily full-time civilian employment) enrolled in some form of postsecondary education. Graduates with non-education plans who enrolled in postsecondary education were more than four times as likely to have enrolled and subsequently withdrawn than graduates who had planned to continue their education.

With regard to institutional choice, the general results indicate that 60 percent of the enrolled education-bound graduates enrolled in Kentucky public universities, 13 percent enrolled in Kentucky private colleges, 10 percent enrolled in public community colleges, 13 percent enrolled in out-of-state colleges and universities, and the remaining five percent enrolled in other postsecondary institutions in Kentucky. In terms of consistency of actual enrollment with the institution the graduate expected to attend, the Kentucky public institutions - four-year, two-year, and vocational-technical - evidenced the strongest "initial retention" in that an average of 85.6 percent of the graduates expecting to enroll in such institutions actually did so; the Kentucky private colleges had the lowest rate at 75.5 percent. Among the 16.5 percent of the graduates who did not enroll in their expected institution, nearly half (48.1 percent) enrolled in a public two-year or four-year college in Kentucky. Further, Kentucky public four-year colleges "captured" 78 percent of students who expected to enroll out-of-state but did not, and 42 percent of students who expected to enroll in a Kentucky private college but did not; the public community colleges in turn "captured" 39 percent of the graduates who expected to attend a Kentucky public university but did not.

Analyses of variance and multiple discriminant analyses currently underway with these results and relevant background data are intended to identify characteristics and circumstances of predictive/explanatory value with regard to the implementation of educational plans and choice of institution. The current analyses will also include comparisons of relevant sub-groups including education-bound and non-education-bound graduates, as well as "regular" and "high ability" graduates.

STATE SUPPORT, STUDENT ENROLLMENT, AND TUITION CHARGES IN KENTUCKY PUBLIC HIGHER EDUCATION 1971-1980: A DECADE OF CHANGES

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State-level higher education agencies who are responsible for the planning and coordination of multiple campuses under a single system are faced with the need to simultaneously evaluate many data elements concerning these campuses. While a simple institution-by-institution comparison may be of value in short-term analysis, a technique which provides for the examination of multiple data elements over a period of several years can provide a clearer understanding to state officials and others of the true direction of the institutions.

It is the purpose of this study to report the findings of research carried out using a comparative indexing technique on three key institutional data elements, state educational support, student enrollment, and tuition charges, over a ten year period. The analyses cover the period 1971 to 1980 and provide a "moving picture" of all public institutions (n=21) as reflected by these three factors. Financial data are presented in actual and indexed values, and are shown in both current and constant dollars.

State educational support is adjusted by the Halstead Higher Education Price Index (HEPI) and examined over the period studied for all public institutions. Comparisons are made with each of these factors and the HEPI and Consumer Price Index (CPI).

Data are presented in twelve tables and eight charts. The study also includes a brief history of changes in the state's higher education system over the period 1971 to 1980, and the role of the state's higher education coordinating agency. It concludes with comments on the findings and recommendations for further studies.

THE USE OF STATE-LEVEL GOALS AS THE BASIS FOR ASSESSING POSTSECONDARY EDUCATION PERFORMANCE

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State-level goals for postsecondary education can do more than serve as ideals; they can also provide a framework for an assessment of postsecondary education performance from a statewide perspective, as well as providing valuable assistance to the institutional research process.

In response to a report of issues affecting postsecondary education in the eighties, the governor of a Southern state charged a state-level advisory committee on postsecondary education with developing "a set of statewide postsecondary education goals which respond to the needs of the people of our State." He directed the committee to identify ways to measure progress toward goal achievement and commissioned the group to begin an assessment of postsecondary education performance and to make recommendations where warranted. This paper briefly describes the goal-development process, the development of the progress measures, and the assessment procedure followed by the committee. Finally, the paper discusses the strengths and weaknesses found to exist in this procedure.

In September 1979 the committee began the task of developing goals. It first reviewed the goal development activities of other states and then developed a first draft of goals for its own state. This draft was revised periodically following three different reviews by the public, state officials, and educators. By January, with an interim final draft in hand, the committee was ready to develop the measures of achievement, or indicators. These were developed with the assistance of five task forces, then publicly reviewed. In June 1980, the committee published its statement of eight goals, accompanied by 30 objectives and 96 indicators, and began to assess the performance of postsecondary education relative to the goals and objectives, focusing its first-year efforts on 11 objectives under 6 goals. A report on the first year assessment, including 22 recommendations, was adopted in September 1981.

The process of basing a state-level assessment of postsecondary education on a comprehensive set of goals and objectives has shown certain strengths. Most importantly, the process can "demyth" problems that have been presumed to exist. On the other hand, the process is limited by the fact that information could not be obtained to assess some objectives adequately. Even this finding, however, can help decision-makers to have a realistic picture of what approaches, objective or subjective or both, must be taken in making policy decisions. Ultimately, the process can lead to the development of an efficient means of monitoring major public concerns about postsecondary education. At the institutional level, researchers will find the process and its results helpful in identifying, and assessing achievement of, institutional goals that address important state concerns, complementing their efforts in areas of concern that are institution-specific.

ATTRITION, RETENTION, AND TRANSFER WITHIN THE KENTUCKY SYSTEM OF PUBLIC HIGHER EDUCATION

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This paper summarizes the results of a recent study of attrition, retention, and transfer within the system of public higher education in Kentucky. Student specific enrollment and degrees conferred information supplied by the eight universities and thirteen community colleges comprising the system and ACT reports comprise the data base. The retention set consists of all students registered at a particular institution in Fall 1979 and at that same institution in Fall 1980. The transfer set consists of all students registered at a particular institution in Fall 1979 and at another institution within the system in Fall 1980. The attrition set consists of all students who did not receive a degree from Fall 1979 through June 1980 and who were registered at a particular institution in Fall 1979 and at no institution within the system in Fall 1980. Tables providing the attrition, retention, and transfer rates by class level and institution are presented. For first-time full-time freshmen the university system has an attrition rate of 27.9 percent ranging from 20.6 percent to 43.9 percent among the universities. The corresponding rate for the community college system is 36.5 percent ranging from 28.0 percent to 47.3 percent. First-time part-time freshmen have an attrition rate of 64 percent in the university system ranging from 58 percent to 74 percent. Statistical analysis reveals a very high correlation between the attrition rate of first-time full-time freshmen at a university and its average composite ACT score. A simple single variate linear regression model relating attrition rate to ACT composite score accounts for 85.2 percent of the variation in attrition among the universities. Adding a qualitative variable to the model which indicates whether a university is primarily residential or commuter produces a new model which accounts for 96.1 percent of the variation in attrition among the universities. Attrition and transfer rates as a function of sex, race, and major are presented as are plans to extend this project into a longitudinal study which will determine the stability of the rates, the re-entry rate of students withdrawing from the system, the persistence rate of each year's cohort, and the average time for program completion.

STATEWIDE ASSESSMENT OF UNMET STUDENT FINANCIAL NEED

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In 1980 Georgia's post-secondary education planning commission (The Governor's Committee on Postsecondary Education) committed itself to 8 goals on behalf of the state's public, private, and proprietary colleges, universities, and vocational-technical schools. The "equal opportunity" goal was one of four assessed in 1981 through a pre-defined set of achievement objectives and achievement indicators. One indicator concerned the existence of financial barriers to participation in postsecondary education.

To determine whether or to what degree financial barriers to post-secondary attendance exist in Georgia, a large-scale study of financial aid recipients was conducted. Attention was limited to in-state undergraduate students who applied for aid during the 1979-80 academic year on the basis of need and received some form of aid. The findings were based on a sample of over 4,600 randomly selected student financial aid records (10%) from 129 institutions. Unmet financial need was calculated using the College Scholarship Service's "uniform methodology."

On the average, the financial aid available was inadequate to cover the estimated expenses of the students. The average amount of aid received was $1,910 and the average expected student/family contribution was $1,369. The average estimated expenses were $3,688, and thus an average unmet need of $406 characterized the students in the sample. Furthermore, the total array of financial aid programs was found to be highly vulnerable to changes in federal financial aid policies in that 73% of all financial aid received by students in the sample was from federal sources.

There also appeared to be a maldistribution of student financial aid: aid was not, in many cases, going to the most needy. With one minor exception, recipients in every type of institution had unmet need. However, the level of unmet need was much greater in some sectors than in others. Furthermore, recipients with student/family incomes over $18,000 had, on the average, overmet need while recipients from lower income families had unmet financial need. In addition, recipients not financially dependent upon their parents had much higher unmet need than dependent recipients. Blacks had noticeably higher unmet need than did Whites. Part-time recipients had much higher unmet need than full-time recipients. Finally, recipients over 24 years old and women had higher unmet need than younger and male recipients respectively.

This statewide assessment of unmet student financial need provided policymakers with information directly relevant to the question of the degree to which financial barriers to post-secondary attendance are being diminished for different categories of students attending different types of post-secondary institutions. Thus, a traditional research design contributed in a significant way to a comprehensive assessment of post-secondary education achievements in Georgia.

AGE AND SEX ENROLLMENT PATTERNS IN KENTUCKY INSTITUTIONS OF HIGHER EDUCATION 1978-79

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Numerous recent studies and published articles have stressed the changes taking place in the type of student entering college. Many authorities have commented on the changing enrollment patterns - particularly the projected increases in minority students, female students, and older students. Everyone seems to agree that the declining pool of traditional college age students will mean more emphasis on older students.

Within the context of these projections, the major question of this study was to determine the age and sex enrollment patterns, and to determine whether or not there was a discernible change in these patterns among students attending Kentucky institutions of higher education. Opening enrollment data from the fall 1978 and the fall of 1979, as reported by the institutions, were used for this study.

Two approaches were used in order to properly investigate the changing patterns of age-related enrollment in Kentucky institutions of higher education. Information was obtained from the Council on Higher Education for the state-supported institutions and from the independent institutions using a special survey instrument. The data were collected from both sources utilizing the same format. Data were obtained for 21 state-supported institutions and for 26 independent institutions, or 100 percent of the surveyed members.

The collected data were then analyzed and presented in table form with comparisons being made between the data for the two years. Comparisons were made according to sex, type of institution, similar purpose institutions, and geographical locations of institutions. The data were also compared to available national data.

The procedure used to report the data was to place the data in a common format and develop tables using percentages. Comparisons were made and some significant results developed. In the fall of 1979, a total of 125,125 students were reported. Complete data were not available for 5,551 students, or four percent of the total. Only six Kentucky institutions had a majority enrollment of male students. The two-year institutions had larger female populations than other institutions.

Greater changes occurred in age patterns than in sex distribution. The Adult (age 30-49) category showed in the greatest increase in percentage of enrollment, while the Young Adult (age 22-29) group decreased. College Age (18-21) students remained approximately the same.

STUDENTS/ATTRITION/DEMOGRAPHICS

Chair: Donald J. Reichard, University of North Carolina at Greensboro

Presentors:		PAGE
	Roberta D. Brown, Arkansas College, "The Survey: Improving Its Usefulness."	53
	Charles H. Bryson, Georgia State University, "Student Demographics In Support of Academic Program Planning."	54
	Edwin A. Rugg, University of Mississippi, "Limitations in Projections of Occupational Outlook for Planning in Higher Education."	55
	Edwin A. Rugg, University of Mississippi, "A Comparison of Minority and Non-minority Student Attrition and Its Uses for Planning."	56
	Terrence H. Scout, University of North Carolina at Charlotte, "Analysis of Selected Admissions Data to Reduce Withdrawal Rates Between Freshman and Sophomore Years."	57

The focus of this session will be discussions on students. The following areas will be addressed: the problem of attrition approached from different perspectives; the issue of occupational projections; and the need for student demographics for planning. All of the studies will provide approaches to gather data in order to improve institutional research and planning with respect to the student.

THE SURVEY: IMPROVING ITS USEFULNESS

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Surveys often yield such low returns that conclusions drawn from them are tentative at best. It may be possible to increase the return rate significantly by using a personalized approach and adding a "surprise incentive." The following is a case in point.

Attrition is a vexing problem, particularly for institutions which are willing to open their doors to a "drop-out prone" clientele. Are the needs of such students being met? What can be done to improve programs and services? One small independent college had used several approaches to analysis of the problem in the past, but never before had it surveyed its former students asking them to reflect upon their college experience.

Two data modules offered by the Council of Independent Colleges were used. The College Experience Survey was correlated with the companion module, the Rate of Attrition instrument. The mailing list for the survey was the total number (N=345) of new full-time freshmen, Fall 1975, '76, '77, '78, '79, who were not still enrolled one year later or two years later.

To encourage response and elicit comments to open ended questions, a personalized letter was produced through the college's word processing center and a TWO-DOLLAR BILL was enclosed. Fifty-two per cent responded!

Former students seemed to appreciate the opportunity to express their opinions. This was indicated by the percentage of persons returning surveys, the care and completeness in filling out questionnaires, the spontaneity of comments, the tone of the writing and telephone calls, the personal notes to favorite faculty, and the fact that many persons signed or gave return addresses (despite the guarantee of anonymity).

Honesty in the responses, which can be assumed from the above factors and the general consistency of replies, can guide the college toward improvement of programs and services. Additionally, results from the survey indicate that the college is presently meeting the needs of many students--even those who may have "stopped out" or "dropped out." Furthermore, enough of the respondents seem to be considering re-enrolling in college at some future date to suggest that a more formal approach to recruiting former students might be productive.

STUDENT DEMOGRAPHICS IN SUPPORT OF ACADEMIC PROGRAM PLANNING

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Knowledge of changing student characteristics is fundamental to planning and policy formulation in higher education. During the last three decades of this century significant changes in patterns of college and university attendance were predicted by the Carnegie Commission. Institutional researchers can support planning and formulation of policy to adapt to these changing student demographic characteristics.

The trend is shifting from students who enter postsecondary education immediately after high school to more students who attend colleges and universities over a broader span of years. An increased adult enrollment has an impact on institutions. In the seventies, enrollment of 25- to 34-year-old college students increased proportionately more than that in the traditional 18- to 24-year-old group. A variety of consequences has occurred for both the institution and the adult student. Part-timers do not provide the same level of financial support for the institution that traditional freshmen do. Faculty tend to consider adult students less capable than younger students. Some institutions often discourage part-time enrollment in favor of full-time, on-campus registration.

Paralleling the changes in the age distribution over the past decade have been changes in the sex ratio of students. Between 1968 and 1978 a 76% increase in the number of women under 35 years of age enrolled in higher education was reported by the U. S. Bureau of Census. The number of women now approaches the number of men enrolled. Female students face many barriers: they are more likely to be in need of financial assistance; they may be presumed to be less capable academically; or they may be expected to maintain dual roles as homemakers and students. To alleviate some of these problems, institutions may need to address admissions requirements, and the expectation that students maintain full-time course loads.

The racial composition of students nation-wide also has changed during the last decade. From 1968 to 1978 the number of blacks increased 135%, so that black students now comprise 10% of the enrollment under 35 years of age. Racial minorities face many of the same problems encountered by women and older students attending colleges and universities.

This paper describes how a student demographic study was conducted at a large urban public university to identify such changes and trends by age, sex, race, academic level, and college. Graphics show changing patterns of enrollment profiles during a six-year period. The results of this demographic study showed that the majority of the students now are women (55.9%), many of whom appear to be selecting academic programs which insure secure employment and career advancement. The enrollment growth seen in business programs results almost entirely from female and minority participation. Both these trends, which parallel national ones, influence academic program planning at this institution.

LIMITATIONS IN PROJECTIONS OF OCCUPATIONAL OUTLOOK FOR PLANNING IN HIGHER EDUCATION

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Within the last decade, the importance of long-range projections of occupational outlook to college and university planners and administrators has risen significantly. Shrinking enrollment, limited resources, and pressures to economize have highlighted the relevance of such projections in decisions concerning the approval of new degree programs, the termination of existing programs, and the identificiation of funding priorities for continuing programs.

Systematic projections of future employment conditions for different occupations are relatively recent developments, evolving in large measure from the efforts of the Bureau of Labor Statistics and cooperating state agencies. The methods used to develop such projections coupled with the nature of the data upon which they are based cause most projections of occupational outlook to have serious limitations. Obviously, it is important for institutional researchers and administrators who use such projections for planning purposes to have a clear understanding of the faults and limitations inherent in them.

This paper provides an overview of the methods used to construct projections of occupational outlook and a detailed discussion of projection limitations and the associated implications for data interpretations. Limitations of such occupational projections include the following:

(a) occupational projections are often out of date before they are published;

(b) projections of employment conditions often fail to properly balance "demand" estimates with "supply" estimates;

(c) assumptions in occupational projection models are frequently overly optimistic (and politically determined);

(d) input data frequently used in projections are often biased and of questionable validity;

(e) occupational projection methodologies are deficient in their capability to accurately anticipate or estimate future changes in the economy.

A COMPARISON OF MINORITY AND NON-MINORITY STUDENT ATTRITION AND ITS USES FOR PLANNING

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In recent years as student enrollments at many universities have begun to level off or decline, interest among campus administrators in the improvement of student retention has blossomed. In response to this interest, increasing numbers of institutional researchers have designed and implemented longitudinal data bases for entering classes of students that yield necessary information for institutional studies of student attrition and retention.

Among the types of analyses that can be performed on such data, comparisons of minority and non-minority student attrition can be among the most useful and interesting to campus administrators. The results of such studies can serve multiple functions. Among these is the description of attrition differences by race which may provide direction for planning retention improvements. In addition, they may serve as an indirect indicator of institutional "climate" for minority students. Documentation of institutional climate for minority students can be very useful to administrators who are involved with minority student and faculty recruitment or affirmative action programs.

This paper presents the results of a comparative analysis of the attrition of minority and non-minority undergraduate students who initially enrolled at the University of Mississippi in the fall of 1976. The enrollment status of these students was tracked for four academic years beginning in 1976-77 and provided the basis for determining the dropout and dismissal frequencies for the class. Entering freshmen were analyzed separately from transfer students. Minority and non-minority groups were compared statistically on the variables of total attrition, attrition resulting from dismissal, and attrition resulting from voluntary discontinuance. The effect of cumulative GPA on voluntary discontinuance for each group was also tested.

Although attrition due to academic dismissal tended to be higher for minority than non-minority students, a surprising finding was that among those who were academically eligible to re-enroll, minority students were less inclined to drop out voluntarily than non-minority students, particularly among those who first enrolled as freshmen. Furthermore, although proportionately more non-minority students with low cumulative grade point averages elected to drop out than non-minority students with high averages, similar effects of academic performance on voluntary discontinuance among minority students were not found.

ANALYSIS OF SELECTED ADMISSIONS DATA TO REDUCE WITHDRAWAL RATES BETWEEN FRESHMAN AND SOPHOMORE YEARS

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The college admissions office, using a tested formula, admits only those students who it is predicted will succeed at that college. Obviously not every student does succeed. Nationally for every ten students admitted only four will graduate from the college of original entry four years later (Pantages & Creedon, 1978:49). Such a situation has a severe impact on institutional operations and finances and negative consequences for personal well-being.

This report attempts to understand a limited aspect of the problem. How should a single institution change its criteria for selecting students so that there is an increase in the number of freshmen students who return for their sophomore year?

Toward that end information was gathered on all freshmen who entered the studied university in August 1979. These students were divided into two groups: those who returned to the university in August 1980 and those who did not. At various places in the analysis they are further divided into those students who have GPA's of 2.00 or better and those who do not. Since the dependent variable, attrition, is a simple dichotomy, crosstabs with chi square and other appropriate statistics was the specific analysis technique used.

Of the 1253 freshmen students who enrolled in August 1979, only 960 or 76.6% reenrolled in August 1980. Of the ones who did not return, 163 had a GPA of less than 2.00 and 130 had GPA's of 2.00 or more.

The demographic variables of sex, age, religion, and residence were not found to be significant factors affecting attrition. Race of student was found to be a factor with black students having higher rates of return.

High school academic variables were not very influential either. High school type, public or private, and high school size did not have an effect. The number of science and geometry units taken in high school were not a factor. The number of algebra and foreign language units were a factor until GPA was controlled. High school non-academic variables such as club memberships were not a factor in attrition.

In this study the variable with the strongest relationship to attrition was housing. Freshmen students who lived in the dormitories were much more likely to return than were freshmen students who lived off-campus. The previous statement is true regardless of one's GPA. What happens to the student after he is at the university is more important for retention than changes in the criteria used to select those students.

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SPECIAL STUDIES

Chair: W. Kevin Hunt, Tidewater Community College

Presentors:		PAGE
	Loyd D. Andrew, Larry McCluskey, Jimmy Fortune, Virginia Polytechnic Institute, "The Uses of Higher Education General Information Survey Data."	59
	Samuel Baldwin, Clark College, "Response Rate and Time of Second and Third Wave Mailing."	60
	Allan M. Bloom and Linda Williamson, Virginia Polytechnic Institute, "Honorary Degree."	61
	Charles D. Salley, Queen's College, "Current Trends in Accountability and Budgeting in Higher Education."	62
	Deborah C. Strickland, James R. Montgomery, Gerald W. McLaughlin, Virginia Polytechnic Institute, "Measuring the Economic Impact of Your Institution."	63

The Special Studies session will be a collection of studies that will give the institutional researcher some additional enriching ideas. The special studies include areas on the following: examining the pattern of awarding honorary degrees; measuring the economic impact of an institution of higher education; using the results of HEGIS information; looking at the difference of a second and third wave survey mailing; and examining the current higher education trends in accountability and budgeting.

USES OF HIGHER EDUCATION GENERAL INFORMATION SURVEY DATA

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Since the late 1960's, the National Center for Educational Statistics has systematically gathered data from approximately 3,000 institutions of higher education on enrollments, degrees conferred, financing, faculty, personnel, and other matters. In 1979, the Center, as part of its continuing efforts to determine the uses and make more useful this expanding data set, commissioned a study to determine how the data were being used, by whom, and for what purposes. This paper reports the results of this study.

The methodologies used in the study included a systematic survey of the literature of higher education, a telephone survey of known and potential users, and indepth personal interviews of about 70 institutional researchers, vice presidents of higher education institutions, and professors of higher education.

The results of the study in a very summary form included the following findings:

1. HEGIS data have provided a foundation or base for the majority of reports and books that have affected public policy on higher education.

2. Enrollment and financial data are used much more extensively than other survey data for analyzing the Condition of Higher Education, policy analysis, and for making decisions at state and local levels. Degrees and other awards conferred data are used extensively for manpower planning.

3. Accuracy has improved.

4. Timeliness of HEGIS data is seen as a major problem.

5. The uses of HEGIS data have increased significantly in recent years, particularly in sophistication with which they are used.

6. HEGIS data have not been used as extensively as they might be in reporting on the condition of women and minorities in higher education.

7. More data are wanted on student characteristics and financial aid.

8. The collection of HEGIS data has had an impact on the discipline and sophistication of data collection systems at institution and state levels.

9. Institutions are concerned about the uses of HEGIS for comparison purposes.

RESPONSE RATE AND TIME OF SECOND AND THIRD WAVE MAILING

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A systematic schedule that utilizes time of the second and third wave mailing as a social condition of the response rate to questionnaires.

The purpose of the study is to examine the relationship among theoretical propositions, empirical hypotheses and measurement. The literature is reviewed for theory, hypothesis, sampling techniques and methodology as directives of time as a social condition of action.

Three hundred subjects were systematically assigned within eleven groups, then contacted at different time intervals. The odd group was contacted seven days after the initial mailing and the even group was mailed questionnaires fourteen days after the first mailing. Each participant who had not returned the questionnaire by the twenty-first day was sent a third follow-up.

The empirical analysis revealed no significant difference in the response rate between the first and second mailing and the third attempt was not financially efficient. However, the time schedule is being retested.

HONORARY DEGREES

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Linda B. Williamson
Institutional Research
Virginia Polytechnic Institute and State University
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The awarding of honorary degrees is a custom of long standing among American colleges and universities, more so in the private than in the public sector. Public institutions, however, are showing increasing interest and activity in this area. This could be due to the increased prestige of public universities over recent decades, with increasingly distinguished faculties wishing to acknowledge the academic excellence of individuals. It could, on the other hand, reflect diminuation of public funding, with honorary degrees being awarded to past or possible "friends" of the university. This study was carried out to examine the status of honorary degree programs among major state universities--the policy, the practice, and perceived value of such programs. A list of public institutions which have awarded honorary degrees over the past decade based a survey to determine current policy and practice among fifteen major universities nationwide. In a follow-up survey, senior academic officers, of honorary degree granting institutions only, were asked their perceptions of the value of their programs. The survey found no pattern by type or prestige of institution relative to having an honorary degree program. Among those with such a program, honorary degrees awarded by faculty for scholarly excellence were well regarded. Nonacademic honorary degrees were viewed often as being more trouble than their worth to the institution.

CURRENT TRENDS IN ACCOUNTABILITY AND BUDGETING IN HIGHER EDUCATION

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The increasing costs of public programs fostered by an inflationary environment have heightened the level of competition for limited state funds. As a result, accountability for public funds and budgeting have become linked in higher education.

This paper reviews much of the recent literature of budgeting and accountability in higher education. Specifically, this summary reviews some of the current budgeting trends in business and government, tracing the shifting emphasis in the latter from executive control to effective management to planning.

The increasing interest in budgeting has led to the publication of Budgeting in Higher Education as an AAHE-ERIC Research Report (Caruthers and Orwig). This timely monograph is the focus of this paper. It first discusses budgeting in business and government. It next considers budgeting in higher education, viewing the process to be a result of multilateral bargaining rather than the result of a comprehensive analysis with decisions made by a central administrator. Five approaches are reviewed.

Incremental budgeting and formula budgeting are designed to routinize decision-making, lead to more predictable results, and minimize conflict and paper work. The rationalist reforms--performance budgeting, zero-based budgeting, and PPBS--are designed to be integrated into the long-run planning process, to continually reassess programs, and to measure program performance.

However, this AAHE-ERIC Research Report and a recent study of cost and analysis published by the American Council on Education emphasize that more is involved in meeting forthcoming fiscal constraint than reallocating resources within new budget concepts. Because salaries represent the biggest budgetary commitment at virtually all institutions, it is expected that there will be a much greater reliance on personnel policy changes that extend beyond technical modification of an institutions's budgeting process.

MEASURING THE ECONOMIC IMPACT OF YOUR INSTITUTION

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James R. Montgomery
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In the decade since the work by Caffrey and Issacs (1971), economic impact studies continue to be a bread and butter topic of study for institutional research offices. This report uses an economic base model to trace about 107 million dollars into the small community surrounding the institution. The majority of the university-related expenditures comes from the approximately 21,000 students with another major proportion coming from over 5,000 university employees. University purchases and visitors account for about 2 percent of the money.

Expenditures by staff and students are estimated within fourteen different categories representing housing, retail purchases, and services. Sample questionnaires used to collect the information are contained in the paper. The paper also demonstrates an approach for calculating economic multipliers using published data on economic activity and employment. This readily available information allowed for the calculation of separate multipliers for retail sales and for housing.

Also included in the paper is a discussion of some specific problems likely to occur in a study of this type. In this regard, examples of ways to handle the economic activity of various auxiliary activities commonly found at most institutions should be of particular interest to the institutional researcher. This presentation will enable the institutional researcher to conduct an economic impact study upon returning home. Its implied theme is that such a study is feasible and profitable.

ERIC DOCUMENT ORDERING INFORMATION

Several of the papers presented at SAIR/NCAIR in Charlotte will be made available through the ERIC microfiche collections. Those papers that are included in the collection will be announced in the May or June 1982 issue of Resources in Education in the Author Index. The order form below may be used to request either a microfiche or paper copy.

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Minutes

SAIR Executive Committee Meeting
Quality Inn, Charlotte, North Carolina
October 29, 1981

The meeting was chaired by the president, Larry G. Jones.

Time: 7:00 A.M. - 8:00 A.M.

Present: Executive Committee Members - Jones, Strenglein, Howard, Larsen, Brown

Executive Committee Members Elect - Litaker, McLaughlin

Absent: Staman

1. Strenglein briefly reviewed the 1981 Budget and the estimated income and expenses. There appears to be a possible surplus of as much as $1,000. It was suggested that the organization's surplus funds be invested in short term CD's. It was also suggested that future local arrangement committee be given a budget to use for negotiating with hotels.

2. The mailing list purge was again discussed. It was decided to instruct the new secretary to pursue this when and if the constitutional change separating the office of secretary/tresurer passes the general membership.

3. Incorporation of SAIR was discussed. Larsen will contact the AIR executive office about using AIR's lawyer to draw up the papers. In the meantime, Strenglein will contract with an accountant to set up proper financial records for the organization.

4. It was announced that the site for the 1982 conference will be Birmingham, Alabama and that Liz Fox of the University of Alabama will serve as head of the local arrangement committee. It was decided that we will select the 1983 site at the Denver forum. The conferences are getting large enough that one year is insufficient for making local arrangements. An attempt will be made to find a 1984 site by October of 1982 in order to provide a full two years lead time in dealing with hotels.

5. The 1982 program was discussed. McLaughlin recommended a general outline which provides workshops on Wednesday and running the formal program from Thursday morning thru Friday noon. He will present a more detailed format at the SAIR executive committee meeting in Denver.

6. The policy manual was again discussed. The consensus was that the President and Secretary work together to coordinate compilation of the manual.

Respectfully submitted,

Denise Strenglein

Minutes

Annual Business Meeting
Southern Association for Institutional Research
Charlotte, North Carolina

October 30, 1981

The meeting was called to order by President Jones at 8:20 A.M. The minutes of the last meeting were approved as published.

Report of Officers

Secy/Treasurer Strenglein gave a verbal summary of estimated income and expense for the 1981 membership year. A formal financial report will be forthcoming in a Newsletter issue, the timing of which will depend on the results of the vote on the change of fiscal year.

Reports of Committees

The Audit Committee work has been delayed pending the results of the vote on the change of fiscal year.

Past President Larsen announced the results of the election of officers:

Vice President	Gerald McLaughlin Virginia Tech
Member-at-Large	Greg Litaker University of Louisville

She also thanked the Nominating Committee which was composed of Stephenie Brown, Charles Bryson and Max Holderfield.

President Jones announced that the site Selection Committee had chosen Birmingham, Alabama as the site for the 1982 conference. Discussion concerning holding a conference in the western part of the region resulted in an invitation to the Texas and Louisiana members to propose an appropriate site for a future meeting.

The 1982 local arrangements Chair, Liz Fox, spoke about the attractions of Birmingham and encouraged everyone to attend in '82.

Maryann Ruddock, chair of the Evaluation Committee, described the 1981 evaluation and encouraged the members to participate in the process.

Gerald McLaughlin, chair of the Constitution and By-Law Committee composed of Frank Black, Al Bloom, George Covis, Denise Strenglein and Norman Uhl, presented the proposed changes. McLaughlin emphasized that the Committee had sought to uncover areas of concern and that it was not their intention to recommend any of the proposed changes.

Reports of Committees Con't

The action of the membership on each of the proposals follows:

Proposal 1 - Split the office of secretary-treasurer into two positions. Secretary-treasurer Strenglein spoke for the proposal. Both she and her predecessor, Mike Staman, had found the work entailed in doing both jobs to be excessive. The proposal passed unanimously.

Proposal 2 - Add new duties to Officers and change section numbers accordingly. The proposal passed unanimously with no discussion.

Proposal 3 - Change the fiscal year. It was explained that the fiscal year change to January would keep the records for each conference in one fiscal year. The current October to October year splits conference expenses into two years. The proposal passed unanimously.

Proposal 4 - Change the procedures for establishing a nominating committee. Discussion focused on two views. On the one hand, keeping the present method of proposing a slate of nominating committee members from the floor at the annual business meeting assures that those members interested enough to attend the meeting have the greatest impact on choosing the organization's officers. On the other hand, the proposed change to an elected nominating committee gives members who cannot attend the annual business meeting an opportunity to have their views represented on the nominating committee. After much discussion, the proposal passed by a close vote of 30 for and 15 against with a number of members abstaining.

Proposal 5 - Add a program and site selection committee. After a brief clarification that this proposal simply formalized an existing informal arrangement the proposal passed unanimously.

Proposal 6 - Change the procedure for circulating amendments to the Constitution. The procedure of circulating changes to the Constitution to members 30 days prior to the conference was an area of concern in that it mandated an extra mailing to members and that it differed from the procedures for proposed changes to the By-Laws which have no time limit. After much discussion, the proposal was overwhelmingly defeated.

Proposal 7 - To clarify Article V, Section 3. The proposal passed unanimously.

Proposal of Nominating Committee - The following is the proposed slate for the nominating committee:

W. Kevin Hunt, Tidewater Community College
Peggy Moore, Old Dominion University
Shirley Chapman, Voorhees College
Diana Joseph, Marshall University
Sandra Storrer, Georgia State University

New Business

Jim Montgomery recognized the members of SAIR who are officers or nominees for office in the AIR.

Greg Litaker moved that the Secretary write a letter of commendation to the Local Arrangements Committee for their efforts in putting on the 1981 conference. The motion passed unanimously.

Outstanding Paper Award

President Jones presented the outstanding paper award to Tim Sanford of University of North Carolina for his 1980 paper, "Helping Admissions with Predicted Graduation Equations for Freshman Applicants."

Announcements

Vice President elect McLaughlin announced that the theme for the 1982 conference will be "Resources in Institutional Research." It will have the dual focus of using IR as a resource in the institution and the institutional and external resources available to institutional researchers.

Adjournment

The meeting adjourned at 9:05 A.M.

Respectfully submitted,

Denise Strenglein

SOUTHERN ASSOCIATION FOR INSTITUTIONAL RESEARCH

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MEMBERS AT LARGE
Charles I. Brown
Fayetteville State University

R. Gregory Litaker
University of Louisville

Minutes
SAIR Executive Committee
Teleconference

December 9, 1981

The meeting was chaired by E. Michael Staman
Time: 9:00 - 10:00 A.M.
Present: Brown, Jones, Litaker, McLaughlin, Staman, Strenglein
Absent: Bryson

1. Conference Post Mortem - The evaluation of the 1981 conference supplied by Maryann Ruddock was discussed. The evaluation was generally favorable. It was decided that, in the future, we might start the formal conference earlier on Thursday with a special interest panel or seminar but that for the general audience we should continue the noon to noon format. The overwhelmingly positive reaction to the keynote luncheon encourages us to continue this event. It must be self supporting, however, since the dues are structured to cover the wine and cheese social but not an additional lunch. It was also tentatively suggested that we make the wine and cheese social at least partially self-supporting since no one seemed to mind the "first drink free--cash bar thereafter" format used in Charlotte.

2. Treasurer's Report - Strenglein reported that the total income thru November for 1981 was $17,386.58 which includes $4,588.14 left from prior years. Total expense through November was $12,570.21. There was a net increase over year-end 1980 of $228.23. The above figures include $3,700 income and $3,700 expense as a pass-thru item for the AIR Newcomers Workshop. Thus the actual SAIR income to date is $9,098.44 and the actual expenditures $8,870.21. The workshops earned over $1,000 more than their expenses. The hotel and food expenses (lunch, wine and cheese, room set ups and coffee breaks) were way over budget ($900 over on a budget of $1,300 approximately). The publicity, which was very effective, was also very expensive. This is a trade-off the conference chair should keep in mind. ($620 was budgeted and $960 spent.)

   The Treasurer will contact Liz Fox, 1982 local arrangement chair, to discuss controlling hotel expenses.

3. Status Report - 1982 Conference

The conference theme will be "Resources of Institutional Research." The keynote speaker is, tentatively, Bill Lasher. The schedule may include Wednesday workshops -- one day-long, (not AIR Newcomer), and two or three half day sessions with some overlap. There will be two or three theme panels running Thursday and Friday with a repeat of the short presented paper/discussion sessions begun in Charlotte. A self-supporting social activity is planned for Wednesday evening with the traditional Wine & Cheese on Thursday evening.

The program committee includes:

Gerry McLaughlin	-	Chair
Richard Howard	-	Workshops
Linda Pratt	-	Presented papers
Fletcher Carter	-	Exhibits
Liz Fox	-	Local Arrangements
Larry Jones	-	Proceedings

The hotel room rate will be $35 single and $40 double. We have blocked 50 rooms Tuesday, 120 rooms Wednesday and Thursday and 25 rooms Friday. These will be released two weeks prior to the conference.

McLaughlin invites suggestions on program content.

4. Incorporation

After some discussion concerning how best to go about incorporating it was moved and seconded that Glynton Smith be asked to be the permanent SAIR contact for incorporation purposes and that we incorporate in Georgia. The motion passed unanimously. Larry Jones volunteered to contact Glynton and to investigate procedures further with an acquaintance on the University of Georgia Law School faculty.

5. Site Selection

A committee has been organized consisting of Mike Staman, Charlie Brown, Greg Litaker and Charlie Bryson from the Board and SAIR member, Maryanne Ruddock. The committee is charged with presenting suggested sites for 1983 and 1984 for discussion at AIR in Denver next May. Since travel by car is assumed to be a factor in attendance, it was suggested that the sites be central to the region. It was also suggested that a call for volunteers for local arrangements be placed in the newsletter. (Staman is doing the Newsletter.)

6. Program 1982 AIR Forum

Mike Staman will arrange for a speaker for 1982 AIR. Allen Pfnister was suggested to address Planning for Higher Education. Staman invited suggestions from the committee.

7. Nominating Committee - All five individuals nominated from the floor at the Charlotte general meeting will be members of the nominating committee chaired by Larry Jones. These members are:

W. Kevin Hunt	- Tidewater Community College
Peggy Moore	- Old Dominion
Shirley Chapman	- Voorhees College
Diana Joseph	- Marshall University
Sandra Storrer	- Georgia State University

8. Miscellaneous

Staman thanked Larry Jones for producing SAIR stationary and arranged for distribution of supplies to the Executive Committee.

Respectfully submitted,

Denise Streuglein

Denise Streuglein
(Acting for Charles Bryson)

APPENDIX A

CONSTITUTION AND BYLAWS*
OF THE SOUTHERN ASSOCIATION FOR INSTITUTIONAL RESEARCH

Article I: Name

The name of the organization shall be the Southern Association for Institutional Research (SAIR).

Article II: Purposes

The major purposes of this Association shall be to provide: 1. for the dissemination of information and the interchange of ideas on problems of common interest; 2. for the continued professional development of individuals engaging in institutional research; 3. for the fostering of unity and cooperation among persons having interests and activities related to institutional research; 4. for the advancement of postsecondary education.

Article III: Membership and Voting

Section 1. Membership in the Association and election to any office or appointment to any committee shall not be based on race, ethnic origin, sex, age, or religious conviction.

Section 2. Membership shall be open to any person who is actively engaged in institutional research or has professional interest in activities related to institutional research.

Section 3. Membership shall include all individuals who pay a registration fee for the SAIR annual meeting and those who do not attend the annual meeting but pay a membership fee. Membership is valid until the start of the next SAIR annual meeting.

Section 4. Except for the election of officers, voting shall take place at the annual business meeting and be restricted to those members in attendance. For the election of officers, a ballot will be included in the announcement of the annual meeting sent to members of this association.

Article IV: Officers

Section 1. The officers of the Association shall consist of a President, a Vice President, a Secretary, and a Treasurer.

Section 2. President. The President shall: a) have general responsibility for promoting membership in the Association; b) appoint committee members; c) serve as chairperson for the annual Conference; d) work with committees in formulating policy and expediting the implementation of such policies; e) consult

*Reflects all changes adopted at the annual business meetings October 26, 1979, and October 30, 1981.

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with the Vice-President in planning the annual Conference; and f) perform any other duties necessary to assist the Association in achieving its purposes as stated in the Constitution.

Section 3. Vice President. The Vice-President shall: a) plan the program for the next year's annual Conference; b) assist the President in other duties as the need arises; and c) assume the duties of the President in the event that person cannot complete his/her term.

Section 4. Past President. Maintain the archives of the Association.

Section 5. Secretary. The Secretary shall: a) maintain and publish an annual listing of the membership of the Association; b) keep the minutes of the annual business meeting and of the meetings of the Executive Committee; c) print and distribute notices and proceedings of the annual Conference; d) print and distribute copies of changes to bylaws and amendments; and e) perform any other duties assigned by the President or Vice President.

Section 6. Treasurer. The Treasurer shall: a) collect annual Conference registration and membership fees; b) provide for the payment of duly authorized expenses of the Association; c) prepare informal financial statements for the Executive Committee and complete financial reports for the annual business meetin and d) serve as ex officio member of the local arrangements committee; e) prepare an annual budget for consideration of the Executive Committee prior to May 1; and f) perform any other duties assigned by the President or Vice President.

Section 7. Terms of Officers. The Vice-President shall be elected for a two-year term and will be President for the second year. The terms of office for the Secretary and the Treasurer shall be for three years and shall not start in the same year. All newly elected officers shall assume office at the close of th annual Conference following the announcement of their electio

Section 8. Vacancies. Unless otherwise provided for in the constitution the Executive Committee shall have the authority to fill a vacancy by appointing an Association member to fill unexpired terms. A person appointed to finish the term of Vice-Presiden must run for election to become President. In this situation both the office of President and Vice-President will appear on the ballot. If the elected President resigns, the Vice-President completes the year as President and is also the President the following year. In all other situations the person appointed to an unexpired term shall be eligible to succeed him/herself and to serve a full elective term as provided in the Constitution.

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Section 9. Succession. Officers cannot succeed themselves in the same office except as noted in Sections 7 and 8.

Section 10. Election of Officers. All officers shall be elected by a ballot distributed to the membership with the announcement of the annual meeting. The ballot shall be returned to the Secretary for tabulation. The results will be announced at the annual business meeting.

Article V: Executive Committee

Section 1. The Executive Committee shall be composed of the President, Vice-President, Secretary, Treasurer, immediate Past-President, and two members-at-large. The current President will chair the Committee.

Section 2. The Executive Committee shall: a) conduct the general affairs of the Association between its annual meetings; b) set the time and location of the next year's meeting; c) function as the Budget Committee; and d) fill vacancies, unless otherwise provided for in the Constitution.

Section 3. One Member-At-Large will be elected each year and will serve for a two-year term. Members-at-large shall assist the Executive Committee in performing duties necessary to help the Association achieve its purposes as stated in the Constitution.

Article VI: Bylaws

The Association shall adopt bylaws consistent with this Constitution as required for the conduct of its affairs.

Section 1. Proposed changes in the bylaws: a) may be submitted in writing to any member of the Executive Committee at least sixty (60) days prior to the annual meeting, or; b) may be proposed through action originating in the Executive Committee.

Section 2. The Secretary shall be responsible for printing any proposed bylaws or amendment(s) initiated in accordance with Section 1 of this Article, and for submitting them to the registered members for consideration at the annual business meeting.

Section 3. A proposed change in the bylaws shall become effective at the end of the annual business meeting at which it was approved by a majority of the registered members present.

Article VII: Amendments

This Constitution may be amended at the annual business meeting.

Section 1. Proposed amendments to this Constitution: a) may be submitted to any members of the Executive Committee by a member of this Association in writing at least sixty (60) days prior to the annual meeting, or b) may originate through actions in the Executive Committee.

Section 2. Proposed amendments must be approved by a two-thirds vote of the Executive Committee.

Section 3. Amendments approved by the Executive Committee shall be circulated at least thirty (30) days prior to the annual business meeting and at the annual business meeting by the Secretary.

Section 4. Proposed changes to this Constitution conforming with Sections 1-3 of this Article shall become effective at the end of the annual business meeting at which they are approved by two-thirds of the registered members present.

BYLAWS

Conference

Section 1. The annual Conference of the Association shall be held during October of each year at a site and date determined by the Executive Committee and approved at the annual business meeting by the registrants in attendance. The Secretary shall be responsible for notifying all members of the date and location of the annual Conference at least sixty (60) days prior to the Conference. The annual business meeting shall be held in conjunction with the annual Conference. The Vice-President of the Association will be in charge of the program for this conference.

Calendar

Section 2. The fiscal year of the Association shall begin January 1.

Fees

Section 3. A. A registration fee will be assessed to all who register for the annual Conference each year. Those who pay this fee will be members until the next SAIR Conference.

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B. A membership fee shall be determined by the Executive Committee and will be assessed to all who do not pay the registration fee but wish to receive the benefit of the following SAIR services to include: Conference proceedings, membership list, advance notice of proposals for changes to the Constitution.

C. A discount in fees shall be established for full-time graduate students by the Executive Committee.

D. Fees shall be reviewed and set annually in July by the Executive Committee.

Committees

Section 4. A. There shall be a Nominating Committee consisting of the immediate past-President and five members elected by the membership. The term of office of each member of the Nominating Committee shall be one year or until a successor takes office. The Nominating Committee shall prepare and report to the Executive Committee, for transmission to the membership, a double slate of candidates for the Nominating Committee and one or more candidates for each of the other positions for which an election is to be held.

B. An Audit Committee shall be appointed by the President for each annual business meeting. The Committee shall audit the Treasurer's books for the preceding fiscal year.

C. A Local Arrangements Committee shall be appointed by the Vice-President in consultation with the President of each annual Conference.

D. The Vice-President shall appoint and chair the Program Committee. The Local Arrangements chairman shall be an ex officio member of this committee.

E. A Site Selection Committee shall be appointed by the President. The Committee shall be chaired by an existing member of the Executive Committee. The Site Selection Committee shall report at each business meeting the site selected for the following Conference.

F. Such other committees as deemed necessary for the welfare of the Association may be appointed by the President.

Quorum

Section 5. A quorum to conduct the business of the Association shall consist of twenty-five (25) of the registrants of the annual Conference.

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APPENDIX B

1981-82

ROSTER OF MEMBERS

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APPENDIX D

1981 SAIR/NCAIR

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Wednesday, October 28

8:00 - 5:00	Newcomers Workshop	
1:00 - 5:00	SAS Workshop	Traditional Black Colleges
1:00 - 5:00	Registration	and Universities (TBCU)

Thursday, October 29

8:00 - 5:00	Registration			
8:00 - 11:30	Newcomers Workshop	Enrollment Workshop	Public Image Workshop	TBCU (10:30-11:30)
12:00 - 1:30	Luncheon and Keynote			
1:40 - 3:10	Panel on Professional Development	Paper Session Equity Research	Paper Session Statistical Methodologies	Paper Session Evaluation
3:10 - 3:30	Refreshment Break - Lobby			
3:30 - 5:00	Panel on Discrimination Research	Paper Session Tools of I. R.	Paper Session Planning and MIS	Paper Session Statewide I. R.
5:00 - 5:30	NCAIR Business Meeting			
6:00 - 7:00	Reception and Cash Bar. NCAIR and SAIR co-host			

Friday, October 30

8:00 - 8:30	General Business Meeting - Coffee and Pastry			
8:40 - 10:10	Special Seminar on Methodist Interactive Database Systems (MINDS)			
10:10 - 10:30	Break			
10:30 - 12:00	Panel on Role of I. R.	Paper Session Attrition/ Demographics	Paper Session Special Studies	